

PROoffice

**Introduction to
ProSMART:
Proforma's Sales Marketing and Relationship Tool**

How to Log On and Get Started

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Introducing ProSMART: Proforma's Sales Marketing and Relationship Tool

ProOffice is the home of ProSMART, the **Proforma Owner Sales, Marketing and Relationship Tool**. This new marketing database and lead management system is designed to give Proforma Owners the ability to efficiently and effectively market to their customers and sales contacts, thereby increasing overall sales. This pipeline will allow Owners to provide automated touches to these two equally important segments of their business. By combining a solid, accurate database with a proven system for efficiently managing Owner leads, the overall goal of increasing sales and penetrating further into existing accounts is well within reach. This will invariably lead to increased sales.

With ProSMART, you can easily manage your contacts, groups, campaigns, and marketing tasks. You will be able to see your Dreams and Goals right in front of you so that you never lose sight of what you are working towards. Use a campaign that our Marketing group has put together, or create one of your own; the choice is yours. For your convenience, ProSMART includes a Media Library for automated marketing touches.

An important focus in this process of increasing sales is effectively targeting contacts and converting them into customers. Additionally, an Owner can more efficiently focus his or her marketing efforts to their existing customers in order to penetrate further into accounts, thereby capitalizing on well-established relationships.

This first phase of ProSMART creates a foundation for future benefits such as collecting historical experience information for use in additional market research and analysis, a platform to support centralized direct marketing activities and management reporting tools to be used in a continuous improvement effort.

ProSMART is a way to help increase brand awareness, and it allows the Owner to pick and choose exactly what marketing materials to send out and to whom, through the use of a fully stocked Media Library. Campaigns are personalized for you from you to the customer or contact. Finally, ProSMART is synchronized with the Proforma Selling System.

With ProSMART, you can be as involved or as interactive as desired. Whether you want to participate in the campaigns initiated by the Support Center or create your own, ProSMART will help you manage those efforts and, more importantly, the responses.



Where is ProSMART Located?

ProSMART is part of the ProOffice order processing system. ProSMART can be accessed even if you are not fully converted to the main ProOffice system. Although it is part of the overall system, one can begin using ProSMART without having completed the ProOffice conversion process. In that sense, the two are independent from one another.

ProSMART is found at the following URL:

<http://prooffice.proforma.com/prosmart>

Because ProSMART is part of the overall system, the main navigation and function elements are consistent with those found throughout the rest of the application. So, once you have an understanding of how to move through ProOMS, ProSMART, or ProOffice, you will not have any trouble moving through and operating within any other components. See “ProOffice: An Introduction” for more details on general navigation and functionality information.

ProSMART Access & Structure

With ProSMART, each Proforma Owner will receive a predetermined number of new prospects per month. These prospects will be funneled into the individual ProSMART database for them to further act upon and process. The Proforma Ad Fund will subsidize these initial contacts. An Owner *is* able, however, to purchase additional prospects above the initial subsidized amount. The ability to control this monthly amount is found right in ProSMART, and the Owner will be billed separately for their additional prospect purchase. Only the Owner will be able to determine the amount of additional prospects their business receives in the monthly drip.

ProSMART has two levels of *security access* for Owners: Owner and Sales Rep access. Owners will have a full-access level of security. They will be able to fully control what happens in their ProSMART system. The “Sales Rep level” access will only allow a Sales Rep to see and operate on the contacts, groups, etc. that are assigned to or created by that Sales Rep. The Sales Rep will not be able to see or operate against other sales reps’ information. In contrast, the Owner will have full access to all data created or delivered to his or her business. For example, the Owner will be able to assign access for others to ProSMART, distribute contacts, manage the number of contacts requested monthly, etc.

ProSMART handles *information* on two main levels: Company and Contact level. For the most part, Contacts are the focus of ProSMART. Any communications are sent to Contacts and history is tracked at the Contact level. Any one Company can have multiple Contacts. Since all of this marketing will be done at the Contact level, communications will not be sent “generically” to the Company level. This Company/Contact relationship can further be understood through the following:

- ♦ There will be a primary Contact designated for each Company
- ♦ All marketing will be directed at the Contact level
- ♦ Account protection will be enforced at the Contact level

Within ProSMART, a single Contact can be assigned to one or many Groups. A Group is a logical collection of Contacts that will be acted upon for marketing activities. A Group can be associated with one or many marketing campaigns. This allows an Owner to continue to reinforce the brand identity and Proforma name.

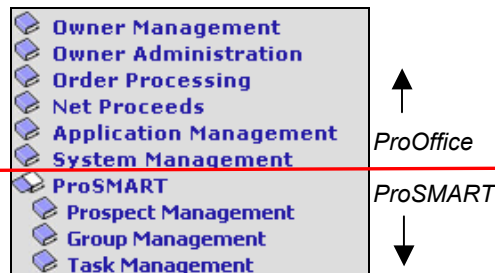
While ProSMART uses terms and concepts common to many marketing and contacting programs or systems, there may be some terms or concepts with which the User is not familiar. For this reason, a list of definitions for some of the commonly used terms throughout ProSMART is listed at the end of this guide in a section called “ProSMART Terms & Definitions.”

Most categories within ProOffice contain a general Search screen. This screen is divided into two types of searches, a Simple Search and an Advanced Search. The Simple Search contains the fields that are queried most often and will be used in most cases. The Advanced Search contains more fields and will be used for more sophisticated searches.

If a search field is filled in, the system will consider it part of the search. If there is more than one field filled in, the system will consider the relationship between the fields to be an “And” relationship. What this means is that all fields must meet the criteria for every completed field in the search or no results will be returned.

All of the functional or operational options for ProSMART can be found in the left navigation menu. To begin working within ProSMART, you will need to display the sub categories within ProSMART. To see all functions within each subcategory, either click on the specific subcategory or simply expand the entire menu.

The ProSMART functions are found in the main ProOffice menu. Click on any subcategory to display all options.



Note: If you are not yet converted to the main ProOffice system from ProStar, you will not be able to view the main ProOffice categories or options. Only the ones pertaining to ProSMART will be visible.

The ProSMART Home Page

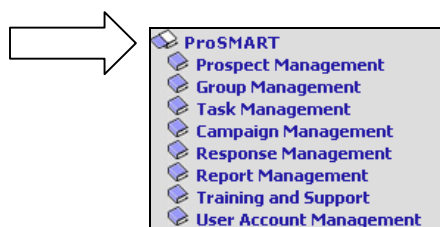
When first accessing ProSMART, you will be taken to the ProSMART Home Page. This is where you can find out some initial information about any new Central Marketing Campaigns and your individual marketing efforts. This Home Page is personalized to greet the User by name, Proforma Owner ID, and Proforma business name. Divided into four main sections, this page serves as the central place to manage the contacting and marketing activities provided by ProSMART.

To View the ProSMART Home Page:

1. Enter your preassigned Login and Password in the login page of ProOffice. Remember, ProSMART is located within ProOffice, and the URL for ProSMART is

<http://prooffice.proforma.com/prosmart>.

2. Click on “ProSMART” from the left category menu.



Without having to click on anything else, you will be at the ProSMART Home Page. This page is your starting point for all other contact and marketing functions within this application. The Home Page contains some very important information, which will better help you to plan your efforts. That information is outlined below.

The four main sections of the Home Page include the following:

Company Message – This message block will provide the User with a specific message, generated by personnel within the Support Center. This message may contain updates on pertinent information, new campaigns, deadline reminders, or even additions to the Media Library. How frequently this message changes is up to the discretion of the designated personnel at the Cleveland Support Center.

Dreams & Goals – This section enables the User to track his or her specific Dreams and Goals. This section is not directly tied to other aspects of ProOffice, but is simply to serve as a reminder of why and what the User is working towards. It is designed to be somewhat motivational and inspirational to continue to convert contacts to customers.

Alerts – This section will display the number, if any, new prospects (that were purchased by Proforma) are in your ProSMART database, as well as a chance to view any active Central Campaigns and a list of task reminders. These tasks can be viewed in more detail or dismissed, if complete.

Top 5 Tasks – This section lists the top five tasks from the Users master Task List. This is to serve as a reminder of what needs attention when. Details of any task from this list can be seen, as well as the complete task list.

Each of these sections will be discussed in more detail. See the example below for a sample of the ProSMART Home Page.

Standard ProOffice navigational elements

Your Name and Proforma Name (determined by login)

The four main sections of the ProSMART Home Page

PROoffice
show Map hide Map expand Map collapse Map my proOffice bookmark print log off

Owner Management
Owner Administration
Order Processing
Net Proceeds
Application Management
System Management
ProSMART
Prospect Management
Group Management
Task Management
Campaign Management--
Marketing View
Campaign Management--
User View
Response Management
Report Management
Training and Support
User Account Management
System Management

Welcome PFG Ventures
ProSMART Home Page

Welcome Tom Hileman Of ProForma Corporate
Welcome To the ProSMART Marketing Database

Dreams And Goals
Edit Dreams Edit Goals

Dreams		Goals		
Dream	Date	Year	Sales	Profit
To develop a financial program to put my children through college.	1/31/2002	2002	\$250000	\$25000
To setup a vacation at Disneyworld for my family.	6/7/2002	2003	\$600000	\$75000
		2004	\$1000000	\$150000

Alerts
There Are 1 New Prospects
View Active Central Campaigns

Task Reminders

Task	Due	Dismiss
Execution of Campaign: Test User	Due: 1/24/2002	Dismiss <input type="checkbox"/>
Send Brochure	Due: 1/27/2002	Dismiss <input type="checkbox"/>
Discuss Two Page Brochures	Due: 1/29/2002	Dismiss <input type="checkbox"/>

Form reset Dismiss Checked

View Top 5 Tasks
View Complete Task List

Date	Contact/Campaign Name	Subject	Status	Type
1/24/2002	Test User	Execution of Campaign: Test User	Overdue	Phone Call
1/27/2002	Johnson, Christine	Send Brochure	Overdue	Direct Mail
1/29/2002	Johnson, Christine	Discuss Two Page Brochures	Overdue	Phone Call

The Company Message

The Marketing Department and Business Development group will use this message, in combination with one another, to communicate information to all ProSMART users. This message could pertain to things such as additions to the Media Library, new Central Campaigns, reminders, or any other pertinent information. This message will be updated regularly, and will act as an additional communication channel between the Marketing Group and Users. Users will not be able to change this message.

Welcome Tom Hileman Of ProForma Corporate
Welcome To the ProSMART Marketing Database

Dreams and Goals

The **Dreams and Goals** part of the Home Page is to serve as a daily reminder of what exactly you are working towards. It can also serve as inspiration or motivation to you to continue. This information is for your use only, and can be edited or updated as often as needed. You can list as many Dreams in this section as you would like.

Dreams And Goals
Edit Dreams Edit Goals

Dreams		Goals		
Dream	Date	Year	Sales	Profit
To develop a financial program to put my children through college.	1/31/2002	2002	\$250000	\$25000
To setup a vacation at Disneyworld for my family.	6/7/2002	2003	\$600000	\$75000
		2004	\$1000000	\$150000

To Add or Edit a Dream:

1. From the ProSMART Home Page, click on the “Edit Dreams” link from below the “Dreams and Goals” heading.
2. Enter the information about your Dream in the text box. There are no formatting requirements for this section.
3. Attach a date to the Dream by either entering the date directly into the box or by clicking on the calendar icon and selecting your date from the calendar.

ProSMART Home Page - Dreams Edit

Related Links

ProSMART Home

Edit Dreams

Dream	Date	
To develop a financial program to put my children through college.	1/31/2002	Delete <input type="checkbox"/>
To setup a vacation at Disneyworld for my family.	6/7/2002	Delete <input type="checkbox"/>
		Add New Dream

Form

reset Save changes

1/22/2002 Delete ☐

Add New Dream

< Feb 2002 > X

S	M	T	W	T	F	S
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	1	2

Select the date from the fly-out calendar.

4. Make any changes to an existing Dream directly in the text box.
5. After editing or adding a Dream, click on the “Save Changes” button to update your list of Dreams.

To Delete a Dream:

1. Click on the “Edit Dreams” link, located below the “Dreams and Goals” heading.
2. Locate the dream you would like to delete from the list.
3. Place a check mark in the “Delete” box to the right of the dream.

Dream	Date	
To develop a financial program to put my children through college.	1/31/2002	Delete <input checked="" type="checkbox"/>
To setup a vacation at Disneyworld for my family.	6/7/2002	Delete <input type="checkbox"/>

4. Click on “Save Changes” to update your list of Dreams.

To Add or Edit your Goals:

1. Click on the “Edit Goals” link, located below the “Dreams and Goals” heading.
2. Enter your Goal information in the appropriate spaces. There is an area for Sales and for Profit for the next three years.
3. Click on the “Save Changes” button once this information is entered in order to secure your changes.

Year	Sales	Profit
2002	\$250000	\$25000
2003	\$600000	\$75000
2004	\$1000000	\$150000

Your Goals can be updated as often as you feel it is necessary. Remember, this is for your use only.

Alerts

This section of the Home Page is used to draw your attention to a few important pieces of information: any new prospects that you have in your database, any active Central Campaigns and reminders for active Central Campaigns. Note that the “new prospect” designation refers to new prospects, purchased from an outside data vendor, that have been added to your database from the monthly prospect drip.

Task Reminders		
Execution of Campaign: Test User	Due: 1/24/2002	Dismiss <input type="checkbox"/>
Send Brochure	Due: 1/27/2002	Dismiss <input type="checkbox"/>
Discuss Two Page Brochures	Due: 1/29/2002	Dismiss <input type="checkbox"/>

If your Alert indicates that you have new contacts in your database, you can view the details of the addition(s) right from this point. As with most aspects of ProOffice, there is often more than one way to get to the same place. The same holds true here.

You can also view your new contacts by choosing the corresponding option from the left navigation menu.

To View New Prospects:

1. Click on “New Prospects,” which is highlighted in blue, located below the “Alerts” header on the ProSMART Home Page.
2. A list of new contacts will then be displayed for your review. Note that at this point you will only see some general information about the record.

New Prospects				
Related Links				
Add Company Import Contacts Export Contacts				
New Prospects				
Page 1 of 1				
Company Name	Contact Name	Type	Postal Code	Product Line(s)
BERTHOLD GRIGSBY INC	PROK, TIM	Customer	44115	Add Task

This list contains the following for each contact:

- ✦ **Company Name**
- ✦ **Contact Name**
- ✦ **Type of Contact**
- ✦ **Postal Code**
- ✦ **Product Lines***

* Note: you will not be able to sort on Product Lines since there may be more than one product line associated with a contact.

As indicated by the blue highlighted text, more details can be seen about either the Company or the Contact.

To View the Details of the Company or Contact:

1. Determine which set of details you would like to view, either Company or Contact level.
2. Click on the name, which is highlighted in blue.

You will notice that with each detail page (for Company Name and Contact Name) there are both Basic and Advanced Details. This page also contains a “Communication Log,” so you can quickly see a record of any communications that have taken place with this particular contact.

An example of both of these detail pages is shown below.

*Sample of
Company details,
both Basic and
Advanced*

Related Links			
Add Company	Add Contact	View Contacts	
Add Contact	Groups Assigned To	Communication Log	

Company Basic Detail			
Edit		Delete	
Company Name:	Bayer Pharma		
Address1:	123 DRUG DR	Address2:	
City:	Phillipston	State/Province:	NEW JERSEY
Postal Code:	12322		
Phone:	(301)234-4322 Ext:	Fax:	
Company ID:	293		

Company Advanced Detail			
Company Type:	Prospect	SIC Code:	Health Services
Address1:	123 DRUG DR	Address2:	
Address3:		Address4:	
City:	Phillipston	State/Province:	NEW JERSEY
Postal Code:	12322	Email:	
Potential Value:	\$1MM - \$5MM	WebSite:	
Revenue:	\$500MM - \$1B	Employees:	1,000 - 4,999
Company Contact Status:	Bad Email Address: No Bad Postal Address: No Bad Phone: No Bad Fax: No	Do Not Solicit Status:	Do Not Solicit: No Do Not Mail: No Do Not EMail: No Do Not Fax: No Do Not Call: No
Company ID:	293	Company Number:	
Notes:	notes		

Recent Communication Log Entries				
Date	Type	Subject	Contact/Campaign	Contact
There are no tasks for this Company				

Sample of
Contact details,
both Basic and
Advanced

Related Links			
Addresses	Phone Numbers	Email Addresses	
Add Communication Item	Communication Log	Groups Assigned To	
Add Contact			

Contact Basic Detail			
Edit			
Salutation:		Primary Contact:	True
Last Name:	Brokaw	First Name:	Bill
Title:		Company:	Bayer Pharma
Address1:	123 DRUG DR	Address2:	
City:	Phillipston	State/Province:	NEW JERSEY
Postal Code:	12322		
Main Phone:	(301)234-4322 Ext:	Main Email:	bbrokaw@hileman.biz
Contact ID:	204		

Contact Advanced Detail			
Contact Type:	Prospect	Product Line:	Promotional Products
Preferred Contact Method:	Phone	Best Time To Contact:	
Nick Name:		Department:	
Responsibility:		Office:	
Manager:		Assistant:	
Spouse:		Anniversary:	2/13/2002
Birthday:	2/8/1962		
Address1:	123 DRUG DR	Address2:	
Address3:		Address4:	
City:	Phillipston	State/Province:	NEW JERSEY
Postal Code:	12322		
WebSite:		Fax:	
Prospect Contact Status:	Bad Email Address: No Bad Postal Address: No Bad Phone: No Bad Fax: No	Do Not Solicit Status:	Do Not Solicit: No Do Not Mail: No Do Not Email: No Do Not Fax: No Do Not Call: No
Notes:			

Recent Communication Log Entries			
Date	Type	Subject	Contact/Campaign
There are no tasks for this contact			

After working with this contact, you may find that there is information that needs to be updated or added in order to complete the record. Any of the information found on this page can be edited.

To Edit Company or Contact Details:

1. Click on the “Edit” link, located below the “Basic Detail” header.

2. Make any necessary changes or additions directly into the form. *This “Edit” form contains information from both the “Basic” and the “Advanced” details pages (they have been combined into one form).* Changes you make here will be displayed in the appropriate detail section.
3. Use the “Related Links” to further work with the record. These links will be covered in further detail in the “Contact Management” section of this document.
4. Click on “Save Changes” to record the new information in the database.
5. You will then return to the “Details” page, and the newly added information will be displayed in the record.

Active Central Campaigns

Note: This section is accessible by the Owner only. Any User without Owner access rights will not have access to this section.

The next part of the “Alerts” box is the “Active Central Campaigns.” This section will take the User directly to any Central Campaigns that are currently set-up, directed and fulfilled by the Marketing Department. **Users will not have to fulfill these campaigns, only indicate participation.** This link is one way that Users can assign contacts to the campaign.

This “Active Central Campaigns” link will give the User the opportunity to view the campaign material, then determine whom from their database they would like to receive the campaign. For more information on Central Campaigns, see the “Campaign Management” section of this document.

Task Reminders		
Execution of Campaign: Test User	Due: 1/24/2002	Dismiss <input type="checkbox"/>
Send Brochure	Due: 1/27/2002	Dismiss <input type="checkbox"/>
Discuss Two Page Brochures	Due: 1/29/2002	Dismiss <input type="checkbox"/>

To View Active Central Campaigns (Owner Only):

1. Click on “Active Central Campaigns,” which is highlighted in blue.

Campaign Name	Campaign Due Date
ProUSA February Postcard	2/6/2002

A listing of any Active Central Campaigns will be displayed. The list will not only have the name of the Campaign, but also the Due Date, or deadline. This date is important if you are considering participating in this campaign, because it is the date by which you must indicate whether or not you will be participating, as well as assigning participants to the campaign. Remember, this campaign will be fulfilled by the Support Center.

To View Details about a Listed Central Campaign:

1. Click on the name of the Central Campaign, which is highlighted in blue.

Name:	March Custom Catalog	Follow-up:	No
Type:	Direct Mail	Follow-up Offset:	0
Media Material:	Custom Proforma Catalog	Ad Fund Maximum # of Participants:	50
Due Date:	2/28/2002	Per Unit Cost:	1.3
Fulfillment Date:	3/5/2002	Block Size:	50
Status:	Active		
Minimum Overage:	50		
Subsidized Block Cost:	50		

All of the details about this particular campaign are listed on this page. The details are important in not only describing the type of materials and fulfillment date, but also the number of participants that you are allowed to assign to this campaign. On this page, you will see:

- ♦ **Name of the Campaign** – The title for this particular Central Campaign.
- ♦ **Type of Campaign** – The format for this Central Campaign.
- ♦ **Media Material** – The type of material that will be distributed in this campaign to the Contacts..
- ♦ **Due Date** – The date by which you must indicate whether or not you will be participating in this campaign.
- ♦ **Fulfillment Date** – When the Central Campaign will be delivered to the contacts.

- ♦ **Status** – Whether or not this is an **active** campaign. If it is not active, it is **closed** and you will not be able to participate in the Campaign.
- ♦ **Minimum Overage** – The minimum number by which you can exceed the subsidized block size.
- ♦ **Subsidized Block Cost** – The size (number) of the block that will be paid by the Ad Fund.
- ♦ **Follow-up** – Whether or not this campaign requires a follow-up.
- ♦ **Follow-Up Offset** – If there is to be a follow-up, the number of days after the fulfillment date.
- ♦ **Ad Fund Maximum Number of Participants** – The number of contacts from your database (that will be subsidized by the Ad Fund) that you can assign to this campaign.
- ♦ **Per Unit Cost** – The cost to send this campaign to each additional contact over the subsidized block size. In the example above, the cost is \$1 per unit, in a block size of \$50. So, there would be a \$50 charge for an additional block.
- ♦ **Block Size** – The size of the block that must be purchased. In the example above, you can send this campaign to additional contacts in block sizes of 50.

This page also contains a number of “Related Links,” which will be discussed in more details later in this document.

If you determine, after reviewing this information, that you would like to participate in this campaign, you will then need to assign participants from your database to the campaign.

To Assign Participants to the Central Campaign:

1. Click on the “Assign Participants to Central Campaign” link, located below the “Central Campaign Detail” header.

Place a check mark in the box by the name of the contact to include that person in the campaign.

Contact Name	Company	Title
<input type="checkbox"/> Johnson, Christine	Biodesign International	VP, Marketing
<input checked="" type="checkbox"/> Claybourn, Sharon	Cell And Molecular Technologies In	
<input type="checkbox"/> Ross, Donna	Environmental Specialties Inc.	
<input type="checkbox"/> Macomber, Victoria	Labsystems	
<input checked="" type="checkbox"/> Griffin, Rod	Marketreach Inc.	
<input checked="" type="checkbox"/> Obray, John	Obrey Insurance Agency	
<input type="checkbox"/> Singer, Rahn	Rahn Singer	
<input type="checkbox"/> Here, Bob	Tennis And Squash Shop	
<input type="checkbox"/> Homann, Lynn	Vwr Scientific Products	
<input type="checkbox"/> Swearingen, Matt	Vwr Scientific Products	
<input type="checkbox"/> LO PRESTI, CARL	A LO PRESTI & SONS	CEO
<input type="checkbox"/> ABOOD, MAURICE	ALADDIN'S BAKING CO	CEO
<input type="checkbox"/> KEARNEY, KEVIN	ARAMARK-GUND ARENA	CEO
<input type="checkbox"/> CASTELLUCCIO, MARC	AREA NETWORKS	CEO
<input type="checkbox"/> BLANC, ARTHUR	ARMONT INDUSTRIES INC	CEO
<input type="checkbox"/> BACIK, DALE	BACIK KARPINSKI ASSOC INC	CEO
<input type="checkbox"/> PROK, TIM	BERTHOLD GRIGSBY INC	CEO
<input type="checkbox"/> STERLING, FRANK	BLONDER CO	CEO
<input type="checkbox"/> BOYKIN, ROBERT	BOYKIN LODGING CO	CEO
<input type="checkbox"/> BOLTON, CHARLES	BRITTANY CORP	CEO

2. From the list that is displayed, place a check mark next to the name of the Contact you would like to include in the campaign. Do this by clicking in the little box to the left of the Contact name. Remember, you may have multiple pages of Contacts, and will need to use the arrow keys at the top of the box to move from one page to the next. If needed, you can resort the columns to change the sort order.

3. You **must** click on the “Save” button at the end of each page in order to have the chosen Contacts included. If you move to the next page without saving the information, those Contacts will not be included.
4. Click on the “Save” button to record your selections.

Task Reminders

The last part of the “Alerts” box on the Home Page contains a list of active Tasks.

The screenshot shows a web interface titled "Alerts". It contains a message "There Are 1 New Prospects" and a link "View Active Central Campaigns". Below this is a section titled "Task Reminders" with a table of tasks. At the bottom are buttons for "Form", "reset", and "Dismiss Checked".

Task Reminders		
Execution of Campaign: Test User	Due: 1/24/2002	Dismiss <input type="checkbox"/>
Send Brochure	Due: 1/27/2002	Dismiss <input type="checkbox"/>
Discuss Two Page Brochures	Due: 1/29/2002	Dismiss <input type="checkbox"/>

The information contained in this list includes the Name of the Task, the Due Date, and whether or not to Dismiss the Reminder.

To See Task Details:

1. Locate the task from the list for which you would like to see details.
2. Click on the name of the task, which is highlighted in blue.

The screenshot shows the "Task Detail" page for the task "Execution of Campaign: Test User". It includes links for "Edit", "Delete", and "Mark Complete". Below these links is a table with task details.

Task Detail			
Subject:	Execution of Campaign: Test User	Frequency:	Every 0 days
Status:	Overdue	Type:	Phone Call
Due Date:	1/24/2002	Notes:	Task Reminder for Campaign: Test User
Campaign ID:	96	Campaign Name:	Test User
Reminder:	3 days	Follow Up:	3 days
Follow Up Message:			

The details of the task will be displayed, along with a series of “Related Links,” which allow you to work with the task in a few different ways. If any changes need to be made, if you would like to delete the task altogether, or if you would like to indicate that this task is complete can all be done via one of the links.

To Edit Task Details:

1. Select the task with which you would like to work.
2. Click on “Edit” from the “Related Links” area located below the “Task Detail” header.

ProSMART Home Page \ Send Brochure \ Task Detail Edit

Edit Task Detail

Subject:	Send Brochure	Contact Name	Johnson, Christine
Date:	1/27/2002	Frequency:	0 Days
Status:	Overdue	Type:	Direct Mail
Notes:	Send capabilities brochure		
Reminder:	3 Days	Follow Up:	0 Days
Follow Up Message:			

Form reset Save Changes

3. Make any desired changes to the task directly into the form.
4. Click on the "Save Changes" button to secure the changes you have made.

To Dismiss a Task Reminder:

1. Locate the task from the list that you would like to dismiss.
2. Place a check mark in the little box to the right of the task (click directly in the box)

Alerts

There Are 1 New Prospects
View Active Central Campaigns

Task Reminders		
Execution of Campaign: Test User	Due: 1/24/2002	Dismiss <input type="checkbox"/>
Send Brochure	Due: 1/27/2002	Dismiss <input type="checkbox"/>
Discuss Two Page Brochures	Due: 1/29/2002	Dismiss <input type="checkbox"/>

Form reset Dismiss Checked

3. Click on the "Dismiss Checked" button to remove that task from your list.

View Top 5 Tasks

The last section of the ProSMART Home Page displays, to the User, their Top 5 Tasks from their complete Task List. This will help the User to plan and organize their marketing activities for the day/week. The list will indicate if a task is overdue, prompting the User to take some sort of action on the task.

This Task List contains a bit more information than what is seen in the Task Reminders portion of "Alerts." Included in this list is:

- ✦ **Task Due Date**
- ✦ **Status**
- ✦ **Contact/Campaign Name**
- ✦ **Type of Task**
- ✦ **Subject**

View Top 5 Tasks				
View Complete Task List				
Date	Contact/Campaign Name	Subject	Status	Type
1/24/2002	Test User	Execution of Campaign: Test User	Overdue	Phone Call
1/27/2002	Johnson, Christine	Send Brochure	Overdue	Direct Mail
1/29/2002	Johnson, Christine	Discuss Two Page Brochures	Overdue	Phone Call

Once again, simply clicking on the Task "Subject," which is highlighted in blue, will show the details of a particular Task.

From this point, a User can also take a look at his or her Complete Task List, not just the top 5 tasks. This will be a helpful planning and organizational tool for the User.

To View the Complete Task List:

1. Click on the “View Complete Task List,” located below the “View Top 5 Tasks” header.

The screenshot shows a web application interface for 'PFG Ventures'. At the top, there is a 'Welcome' banner and a breadcrumb trail: 'ProSMART Home Page \ Task List'. Below this is a 'Task Summary' section with a 'Page 1 of 1' indicator and navigation arrows. A table displays the following tasks:

Date	Contact/Campaign Name	Subject	Status	Type
1/24/2002	Test User	Execution of Campaign: Test User	Overdue	Phone Call
1/27/2002	Johnson, Christine	Send Brochure	Overdue	Direct Mail
1/29/2002	Johnson, Christine	Discuss Two Page Brochures	Overdue	Phone Call

Below the table, there is a filter section: 'Show Complete for Number of Days:' with a text input field containing the number '5' and an 'Update' button.

2. The entire Task List will now be displayed. Any necessary changes can be made to an individual Task right from this point by clicking on the Task “Subject,” which is highlighted in blue.
3. If desired, you may change the number in the “Show Complete for Number of Days.” The default value for this is 5. This shows your Task List for the previous x days (here: 5), including today.
4. Click on the “Update” button to secure any changes you have made to the Task List.

The ProSMART Home Page contains a lot of information but will help the User to see, at a glance, exactly what is happening with their marketing efforts. It will help to organize efforts and enable a User to better plan their weekly activities.

Managing Contacts

ProSMART gives you complete control over how you want to manage your own contact list. As mentioned earlier in this document, each Owner using ProSMART will automatically be allocated the predetermined number of new prospects per month, which are subsidized by the Proforma Ad Fund. If an Owner determines that he or she would like to receive more than the allocated number of prospects per month, that Owner is able to purchase additional prospects for a fee. The Owner will then be billed for those additional contacts.

To work with or manage your entire Contact list, you will need to click on the “Contact Management” category from the left navigation menu.



View/Search for Contacts

In ProSMART, you are able to view your entire contact list or search for one particular contact.

To View or Search for Contacts:

1. Click on “View/Search” from below “Contact Management” on the left navigation menu.

This will take you to a “Search” screen. As with other search screens within the ProOffice family, this one is divided into a “Simple Search” area and an “Advanced Search” area. You will also notice that there is a series of “Related Links” which will allow you to perform additional functions.

The “Simple Search” area allows you to search on the fields that are queried most often. The “Advanced Search” area contains more search options and allows you to perform searches that are more sophisticated. Leaving all fields blank and clicking on the “Submit” button will bring back all records contained in the database. An example of the complete search page is shown below.

Related Links	
Add Company	New Prospects
Import Contacts	Export Contacts
	Task List

Simple Company Search	
Item	Value
Company Name:	<input type="text"/>
Contact Last Name:	<input type="text"/>
Contact First Name:	<input type="text"/>
Company Type:	<input type="text"/>
Product Line:	<input type="text"/>
Form <input type="button" value="reset"/> <input type="button" value="Submit"/>	

Advanced Company Search	
Item	Value
Company Name:	<input type="text"/>
Contact Last Name:	<input type="text"/>
Contact First Name:	<input type="text"/>
Company Address 1:	<input type="text"/>
Company City:	<input type="text"/>
State/Province:	<input type="text"/>
Postal Code:	<input type="text"/>
SIC Code:	<input type="text"/>
Company Type:	<input type="text"/>
Product Line:	<input type="text"/> <div> Commercial Printing Promotional Products Business Documents E-Commerce Solutions </div>
Number of Employees:	<input type="text"/>
Revenue:	<input type="text"/>
Potential Value:	<input type="text"/>
Phone:	<input type="text"/>
Email:	<input type="text"/>
Company Number:	<input type="text"/>
Form <input type="button" value="reset"/> <input type="button" value="Submit"/>	

- Enter your search parameters in the appropriate fields (and in the appropriate search box), and click on the "Submit" button. Remember, you may choose to leave all fields blank and conduct a blanket search. Doing so will return all records.

Company Search Results				
Related Links Add Company New Prospects Import Contacts Export Contacts				
Company Search Results				
Page 1 of 3				
Company Name	Contact Name	Type	Postal Code	Product Line(s)
A LO PRESTI & SONS	LO PRESTI, CARL	Customer	44101	Add Task
ALADDIN'S BAKING CO	ABOOD, MAURICE	Customer	44115	Add Task
ARAMARK-GUND ARENA	KEARNEY, KEVIN	Customer	44115	Add Task
AREA NETWORKS	CASTELLUCCIO, MARC	Customer	44115	Add Task
ARMONT INDUSTRIES INC	BLANC, ARTHUR	Customer	44115	Add Task
BACIK KARPINSKI ASSOC INC	BACIK, DALE	Customer	44115	Add Task
BERTHOLD GRIGSBY INC	PROK, TIM	Customer	44115	Add Task
Biodesign International	Johnson, Christine	Customer	04043	Commercial Printing Add Task
BLONDER CO	STERLING, FRANK	Customer	44115	Add Task
BOYKIN LODGING CO	BOYKIN, ROBERT	Customer	44115	Add Task
BRITTANY CORP	BOLTON, CHARLES	Customer	44115	Add Task
C E FOODS INC	SAMRELLIS, CODINO	Customer	44115	Add Task
CAHNERS BUSINESS INFORMATION	MC WILLIAMS, DENNY	Customer	44115	Add Task
CAITO BROTHERS CO	CAITO, LEO	Customer	44115	Add Task
CARNEGIE CAPITAL ASSET MGMT CO	MATEYO, GEORGE	Customer	44115	Add Task
CAVS GUND ARENA	BOLAND, JIM	Customer	44115	Add Task

As mentioned earlier, you can see more detailed information about a specific Company or Contact simply by clicking on the appropriate name, which is highlighted in blue. You can also attach a Task to a particular Contact.

To Add a Task to a Contact:

1. Locate the name of the contact you would like to work with from the list.
2. Click on "Add Task," located to the right of the name. A Task Detail dialog box will be displayed.

Add Task Detail			
Subject:		Contact Name	PROK, TIM
Date:	2/6/2002	Frequency:	0 Days
		Type:	Phone Call
Notes:			
Reminder:	3 Days	Follow Up:	3 Days
Follow Up Message:			
Form		reset	Add Task

3. Complete the form with the appropriate task information. You will notice that there is very little required information in this form, but filling in as many of the fields as possible will provide a more complete and accurate record.
4. Click on the "Add Task" button to secure your changes. After you click on "Add Task," you will see your recently revised Task List, including the new addition.

Company Search Results \ Add Task \ Task List

Task Summary

Page 1 of 1

Date	Contact/Campaign Name	Subject	Status	Type
1/24/2002	Test User	Execution of Campaign: Test User	Overdue	Phone Call
1/27/2002	Johnson, Christine	Send Brochure	Overdue	Direct Mail
1/29/2002	Johnson, Christine	Discuss Two Page Brochures	Overdue	Phone Call
2/6/2002	PROK, TIM	Initial Contact	Active	Phone Call

Show Complete for Number of Days:

Contact Management: Related Links

You will notice that above the “Simple Company Search” box is a series of “Related Links.” These links allow you to perform additional functions relating to your Contact list. Each of these links is explained below:

Company Search

Related Links

[Add Company](#)
[New Prospect](#)
[Export Contacts](#)
[Import Contacts](#)
[Task List](#)

Simple Company Search

Item	Value
Company Name:	<input type="text"/>
Contact Last Name:	<input type="text"/>
Contact First Name:	<input type="text"/>
Company Type:	<input type="text"/>
Product Line:	<input type="text"/>

Add Company

This link allows you to manually enter a contact into your ProSMART database. Again, not all of the fields are required, but providing as much information as possible will help to provide an accurate, complete contact record.

Form used to add a new Company record.

Related Links

[New Prospects](#)

Add Company

Company Name:	<input type="text"/>	Company Number:	<input type="text"/>
Address1:	<input type="text"/>	Address2:	<input type="text"/>
Address3:	<input type="text"/>	Address4:	<input type="text"/>
City:	<input type="text"/>	State/Province:	<input type="text" value="AK"/>
Postal Code:	<input type="text"/>	Email:	<input type="text"/>
Phone:	Prefix: <input type="text"/> Number: <input type="text"/> Ext: <input type="text"/>	Fax:	Prefix: <input type="text"/> Number: <input type="text"/>
Potential Value:	<input type="text" value="Unknown"/>	WebSite:	<input type="text"/>
Revenue:	<input type="text" value="Unknown"/>	Employees:	<input type="text" value="Unknown"/>
Company Type:	<input type="text" value="Prospect"/>	SIC Code:	<input type="text" value="Unknown/Non-Classifiable Establishments"/>
Do Not Solicit:	<input type="text" value="No"/>		
Do Not Mail:	<input type="text" value="No"/>		
Do Not EMail:	<input type="text" value="No"/>		
Do Not Fax:	<input type="text" value="No"/>		
Do Not Call:	<input type="text" value="No"/>		
Notes:	<input type="text"/>		

In this form, you will provide:

- ✦ **Company Name**
- ✦ **Company Number**
- ✦ **Address**
- ✦ **City, State/Province, Postal Code**
- ✦ **Telephone and Fax Number**
- ✦ **Email Address**
- ✦ **Web Site URL**
- ✦ **Potential Value**
- ✦ **Company Revenue (if known)**
- ✦ **Number of Employees (if known)**
- ✦ **Company Type**
- ✦ **SIC Code**
- ✦ **“Do Not Solicit” Status (general, mail, email, fax, call)**
- ✦ **Notes**

Note: The field “Do Not Solicit” refers to a request made by an individual to not receive solicitations in one form or another; be it mail, email, fax, telephone calls, or in general. If someone has requested to not receive solicitations, you may change the corresponding category to reflect that request.

Click on the “Add Company” button to save this information. The new contact is now added to your ProSMART database, and is available for inclusion in marketing activities. However, the record is not necessarily complete.

By using the “Related Links, as seen in the example below, you may choose to provide additional information to the record, such as Editing the record, Adding a Contact, Assigning this Company to Groups, or adding an entry to the Communication Log.

Related Links			
Add Company	Add Contact	View Contacts	
Add Contact	Groups Assigned To	Communication Log	

Company Basic Detail			
Edit		Delete	
Company Name:	Bayer Pharma		
Address1:	123 DRUG DR	Address2:	
City:	Phillipston	State/Province:	NEW JERSEY
Postal Code:	12322		
Phone:	(301)234-4322 Ext:	Fax:	
Company ID:	293		

Company Advanced Detail			
Company Type:	Prospect	SIC Code:	Health Services
Address1:	123 DRUG DR	Address2:	
Address3:		Address4:	
City:	Phillipston	State/Province:	NEW JERSEY
Postal Code:	12322	Email:	
Potential Value:	\$1MM - \$5MM	WebSite:	
Revenue:	\$500MM - \$1B	Employees:	1,000 - 4,999
Company Contact Status:	Bad Email Address: No Bad Postal Address: No Bad Phone: No Bad Fax: No	Do Not Solicit Status:	Do Not Solicit: No Do Not Mail: No Do Not EMail: No Do Not Fax: No Do Not Call: No
Company ID:	293	Company Number:	
Notes:	notes		

Recent Communication Log Entries				
Date	Type	Subject	Contact/Campaign	Contact
There are not tasks for this Company				

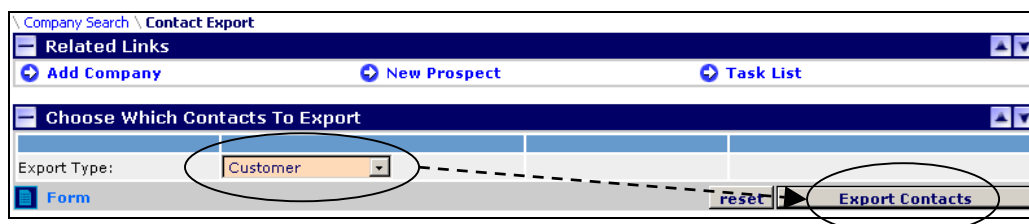
New Prospects

By clicking on this link, you will be able to see a list of any new contacts in your database. These are contacts that have been added to your database from the monthly prospect drip, but have not yet been acted upon. This does not include any prospects that you have added to ProSMART yourself. If there are no new contacts, a message will be displayed indicating that there are no results.



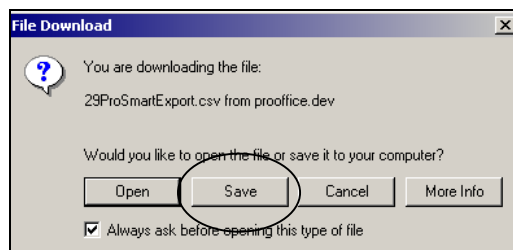
Export Contacts

If you would like to take your contact list and export it to another application, you can do so simply by selecting the “Export Contact” link.



1. Choose from the drop-down menu the type of contacts you would like to export.
2. Click on the “Export Contacts” button to continue the process.

You will see a box indicating that you are about to download a file. Decide whether you would like to simply open the file or save it to another location on your system. In the example below, “Save” was chosen.



After selecting “Save,” you will be able to view the contact list in a very basic spreadsheet format, from which you can continue to work with the information.

A1 Prospect ID												
	A	B	C	D	E	F	G	H	I	J	K	
1	Prospect	Prospect Name	Address1	Address2	Address3	City	State	Postal Code	Country	Phone	Fax	Contact
2		121 Biodesign	105 York Street			Kennebunk	MAINE	4043	United States	2.08E+09	2.08E+09	Chris
3		122 Cell And M	580 Marshal Street			Phillipsbur	NEW JERSEY	8865	United States	9.08E+09	9.09E+09	Sharon
4		124 Clover Res	27 Washington St			Columbia	NEW JERSEY	7832	United States	9.08E+09	9.08E+09	E-m
5		124 Clover Res	27 Washington St			Columbia	NEW JERSEY	7832	United States	9.08E+09	9.08E+09	Cary
6		127 Environme	4412 Tryon Road			Raleigh	NORTH CAROLINA	27605	United States	8.01E+09	9.2E+09	Don
7		131 J. A. McGi	48 West Broadway			Derry	NEW HAMPSHIRE	3038	United States	6.03E+09		0 Mike
8		132 Labsystem	8 East Forge Parkway			Franklin	MASSACHUSETTS	2038	United States	8.01E+09	5.09E+09	Vict
9		133 Marketreat	57 South F	Po Box 10	Po Box 10	Bedford	NEW HAMPSHIRE	3110	United States	6.04E+09	6472370	Rod
10		136 Obrey Insu	20 Birch Street			Derry	NEW HAMPSHIRE	3038	United States	6.03E+09	4256769	Johr
11		140 Rahn Sing	2 Autumn Lane			Hackettstc	NEW JERSEY	784047	United States	9.09E+09	9.09E+09	Rah
12		142 Tennis Anc	67 Mt. Auburn St.			Cambridge	MASSACHUSETTS	2138	United States	6.18E+09		0 Bob
13		144 Vwr Scient	Goshen Ct	1310 Gosh	1310 Gosh	West Chester	PENNSYLVANIA	19380	United States	6.1E+09	6.1E+09	Lynn
14		144 Vwr Scient	Goshen Ct	1310 Gosh	1310 Gosh	West Chester	PENNSYLVANIA	19380	United States	6.1E+09	6.1E+09	Matt
15		148 testcomp	TESTADD	TESTADD	TESTADD	testcity	OHIO	21323123	United States	2222		testl

Import Contacts

Just as you can export a contact list out of ProSMART, you can also import a list into your ProSMART database.

To Begin the Importing Process:

1. Click on the "Import Contacts" link from the list of "Related Links."
2. Indicate the name of the file that contains the information you would like to import. If you do not know the name, click on the "Browse" button to help locate the file.

Related Links

[General Import Template](#)
[Add Company](#)
[New Prospect](#)

[Export Contacts](#)
[Task List](#)
[Creating ProStar Import File](#)

Choose Contact Import File

Import File:

Browse...

Import Type:

Select A Type

Form

reset

Import Prospects

3. Select the "Import Type" using the drop-down menu. The type can be either a general import (such as a .csv file), or a ProStar import.
4. Click on the "Import Prospects" button to continue the process.

You will notice that on this page there is yet another group of “Related Links” that are available. These links include:

- ♦ **General Import Template** – Will display an Excel spreadsheet with the fields necessary for a successful Contact Import. You will then be able to use this as your template for which to put data in the correct format. This will help to ensure a successful import.

	A	B
1	Company	Number,*Company Name,*Address1,*Address2,*Address3,*City,*State,*Postal
2		Code,*Country,*Phone,*Fax,*Contact Salutation,*Contact First Name,*Contact Last Name,*Contact
3		Title,*Contact Company,*Contact Address1,*Contact Address2,*Contact Address3,*Contact City,*Contact
4		State,*Contact Postal Code,*Contact Country,*Contact Email,*Contact Business Phone,*Contact Home
5		Phone,*Contact Fax,*Contact Cell,*Contact Pager
6		
7		
8		
9		
10		

- ♦ **Add Company** – Will bring you to the form used to add a Company to your ProSMART database.
- ♦ **New Prospect** – Will bring you to the form used to add a Prospect to your ProSMART database.
- ♦ **Export Contacts** – Will allow you to export your Contact to a different application.
- ♦ **Task List** – Will take you directly to your summary Task List.
- ♦ **Creating ProStar Import File** – Will display instructions for creating a Customer Data File from ProStar to import to ProSMART. If needed, these instructions can be printed for future reference.

ProSMART will automatically scan the imported information to check for duplicate entries. If there are duplicates, the system will reject those records and not import them, thus preventing you from duplicating your efforts.

The new information is now a part of your ProSMART database, and you are able to add the Contacts to campaigns, track communications with them, and assign them to Groups.

Task List

By selecting the “Task List” option, your complete Task List will be displayed.

Company Search \ Task List				
Task Summary				
Page 1 of 1				
Date	Contact/Campaign Name	Subject	Status	Type
1/24/2002	Test User	Execution of Campaign: Test User	Overdue	Phone Call
1/27/2002	Johnson, Christine	Send Brochure	Overdue	Direct Mail
1/29/2002	Johnson, Christine	Discuss Two Page Brochures	Overdue	Phone Call
2/6/2002	PROK, TIM	Initial Contact	Active	Phone Call
Show Complete for Number of Days:			5	Update

Create Contacts

The second option you will see within the “Prospect Management” category on the left navigation menu allows you to “Create” a Contact. This process will allow you to add your own Contact to your ProSMART database. Although this process would not normally be used when entering a large list of Contacts (since it is a manual process), it is helpful when entering one Contact record at a time.

Related Links			
New Prospects			
Add Company			
Company Name:		Company Number:	
Address1:		Address2:	
Address3:		Address4:	
City:		State/Province:	AK
Postal Code:		Email:	
Phone:	Prefix: <input type="text"/> Number: <input type="text"/> Ext: <input type="text"/>	Fax:	Prefix: <input type="text"/> Number: <input type="text"/>
Potential Value:	Unknown	WebSite:	
Revenue:	Unknown	Employees:	Unknown
Company Type:	Prospect	SIC Code:	Unknown/Non-Classifiable Establishments
Do Not Solicit Status:	Do Not Solicit: No Do Not Mail: No Do Not EMail: No Do Not Fax: No Do Not Call: No		
Notes:			
Form		reset	Add Company

For the following fields, the values will default to “Unknown:”

- ✦ Potential Value
- ✦ Revenue
- ✦ Employees
- ✦ SIC (Standard Industry Classification) Code

If you are not sure of these values, simply leave them set to “Unknown.” If you have an idea of what the values are, make your selection from the drop-down menu. If and when this information is available, Proforma will provide the actual information for these fields from the outside data vendor. This will be part of the deduplication process.

Once again, this form will only provide some basic information. To add more detail to the record, you will need to rely on the “Related Links.” These links are explained in more detail below.

Aurora Management			
<div> <div>Related Links</div> <div> View Contacts Add Contact Groups Assigned To </div> </div>			
<div> <div>Communication Log</div> </div>			
<div> <div>Prospect Basic Detail</div> <div> Edit Delete </div> </div>			
Prospect Name:	Aurora Management		
Address1:	26 GOERGETOWN RD	Address2:	
City:	Hudson	State/Province:	OHIO
Postal Code:	44236		
Phone:	330 650 Ext: 1234	Fax:	330
Prospect ID:	324		
<div> <div>Prospect Advanced Detail</div> </div>			
Prospect Type:	Prospect	SIC Code:	Business & Personal Services
Address1:	26 GOERGETOWN RD	Address2:	
Address3:		Address4:	
City:	Hudson	State/Province:	OHIO
Postal Code:	44236		
Email:		WebSite:	
Revenue:	Unknown	Employees:	10 - 19
Prospect Information	Bad Email Address: No	Do Not Solicit Status:	Do Not Solicit: No
State:	Bad Postal Address: No		Do Not Mail: No
	Bad Phone: No		Do Not Email: No
	Bad Fax: No		Do Not Fax: No
			Do Not Call: No
Prospect ID:	324	Prospect Number:	
Notes:			
<div> <div>Recent Communication Log Entries</div> </div>			
Date	Type	Subject	Contact/Campaign
			Contact

View Contacts

To view information about a specific Contact within the company (an individual), you will need to choose “View Contacts” from the list of “Related Links.” Choosing this will bring up a listing of all contacts associated with that company.

Add Contact

When you completed the initial “Add Contact” form, you may have noticed that there was not a place to enter information about a specific individual at the Company. To get that information into ProSMART, you will need to select the “Add Contact” link from the list of “Related Links.”

1. Click on “Add Contact” from the list of “Related Links.”
2. Provide the requisite information in the form.

Add Contact

Last Name: First Name:

Salutation:

Title: Company:

Address1: Address2:

Address3: Address4:

City: State/Province:

Postal Code:

Phone: Prefix: Number: Fax: Prefix: Number:

Ext: Ext:

Email: WebSite:

Contact Type: Product Line:

Primary Contact:

Preferred Contact Method: Best Time To Contact:

Nick Name: Department:

Responsibility: Office:

Manager: Assistant:

Spouse: Anniversary:

BirthDay:

Do Not Solicit Status: Do Not Solicit: Do Not Mail: Do Not EMail: Do Not Fax: Do Not Call:

Notes:

Form

Can choose more than one Product Line by holding down the [Ctrl] key when making your selection.

Note: "Product Lines" is a multi-selectable field, meaning that you can choose more than one Product Line to attach to this Contact record. To select more than one Product Line, simply hold down the [Ctrl] key when making your selection. This is indicated in the example above.

- Click on the "Add Contact" button to secure the new information.

Related Links

[Add Company](#) [Add Contact](#) [View Contacts](#)

[Add Contact](#) [Groups Assigned To](#) [Communication Log](#)

Company Basic Detail

[Edit](#) [Delete](#)

Company Name:

Address1: Address2:

City: State/Province:

Postal Code:

Phone: Ext: Fax:

Company ID:

Company Advanced Detail

Recent Communication Log Entries

Date	Type	Subject	Contact/Campaign	Contact
There are not tasks for this Company				

There is another series of "Related Links" that can be used to provide more information to this contact record. Keep in mind that multiple entries are naturally supported in ProSMART, just as in the rest of ProOffice. This means that if you need to, you can enter multiple addresses, phone numbers, email addresses, etc.

Groups Assigned To

Selecting the “Groups Assigned To” link from this point in the application will bring up a list of all the Groups that this individual has been assigned to. Since a Contact can belong to many Groups, this list may contain many different entries.

Communication Log

Selecting the “Communication Log” link will bring up a list of all communication actions initiated or planned with this particular contact.

To View the Communication Log:

1. Click on the “Communication Log” links from the list of “Related Links.” Any communication records for that contact will be shown.
2. To see the details of any specific incident, simply click on the “Subject,” which is highlighted in blue.

Date	Type	Subject	Campaign	Contact
2/6/2002	Phone Call	Initial Phone Call	No	Smith, Tracy

Communication Log Detail - Smith, Tracy	
Date:	2/6/2002
Subject:	Initial Phone Call
Type:	Phone Call
Notes:	Discussed capabilities, possible projects

If necessary, the communication item can be edited or deleted, as needed.

When adding an item to the Communication Log, you will be prompted to provide some basic details.

Add Communication History Detail - Smith, Tracy	
Date:	2/6/2002
Subject:	Initial Phone Call
Type:	Phone Call
Notes:	Discussed capabilities, possible projects
Add A Follow Up Task <input checked="" type="checkbox"/>	
Subject:	Send brochure
Date:	2/6/2002
Type:	Direct Mail
Notes:	Send capabilities brochure to show variety
Reminder:	3 Days

Form reset Add Item

These basic details include:

- ♦ **Date of the Communication**
- ♦ **Subject of the Communication**
- ♦ **Type of Communication**
- ♦ **Any applicable Notes**
- ♦ **Whether or not to add a Follow-Up Task.**

If you select to have a Follow-Up Task, you will be required to provide the same details for the follow-up as you provided for the initial communication. In other words, if the “Add A Follow-Up” box is checked, “Subject” and “Date” will be required fields. This Follow-Up will now be added to your main Task List.

As a general marketing “best practice” rule, it is a good idea to have a follow-up task or “to-do” anytime you have had any type of communication with a Contact. This will ensure a solid, thorough follow through with a Contact.

Once you have saved that information, the newly added items will be incorporated into the Communication Log, as well as the Task List.

Communication Log Summary			
Date	Type	Subject	Campaign
2/6/2002	Phone Call	Initial Phone Call	No
Top 10 Tasks For Smith, Tracy			
View Complete Task List			
Due Date	Subject	Status	Type
2/6/2002	Send brochure	Active	Direct Mail

Group Management

In ProSMART, a Group is a subset of Contacts; a logical collection of Contacts. One contact can be associated with many groups, and one group can be associated with many different campaigns. In groups, you do not need to differentiate between contacts and customers. Campaigns will be discussed in more detail later in this document.

To begin working with Groups, click on “Group Management” from the left navigation menu.



There are two main options available in this section; View/Search for Groups and Create a Group.

Create a Group

Since there is no limit to the number of groups that you can have in ProSMART, and any one contact can belong to multiple groups, there will be many times when you will want to create a new Group. The process of creating a new Group is a 2-step process. The first step involves establishing the parameters of the new Group, and the second step involves assigning members to the Group.

To Create a New Group:

In order to create a new Group that can be used for various marketing campaigns, you must first define the Group and establish the parameters for membership. There is a simple form that is used to set up these guidelines.

1. Click on “Create” from within the “Group Management” category in the left navigation menu. This will open a form into which you can enter your parameters. You will notice that there are no required fields, but providing more information will help to define the Groups in your mind so there is no duplication of efforts.

Use the form to create a new Group

Create Group			
<div>Related Links</div> <div>Search Groups</div>			
Group Creation Parameters			
Type:	<input type="text"/>	SIC:	<input type="text"/>
Product Line:	<div>Commercial Printing</div> <div>Promotional Products</div> <div>Business Documents</div>	Comp. Revenue:	<input type="text"/>
City:	<input type="text"/>	# of Employees:	<input type="text"/>
State/Province:	<input type="text"/>	Potential Value:	<input type="text"/>
Postal Code:	<input type="text"/>		
Form		reset	Create

2. Enter the Group information in the form. Include the following pieces of information:

- ♦ **Type (Customers, Prospects, Inactive)**
- ♦ **SIC (using the drop-down menu)**
- ♦ **Product Line (multi-selectable)**
- ♦ **City, State, Postal Code**
- ♦ **Company Revenue**
- ♦ **Number of Employees**
- ♦ **Potential Value**

SIC refers to Standard Industry Classification, a standard coding system. This drop-down will contain the 13 high-level categories of SIC code.

More than one Product Line can be selected by holding down the [Ctrl] key while making your selection.

3. Click on the “Create” button to create the new Group.

After you have established the parameters for the new Group, you will then see a list showing all the Contacts in your database that satisfy those parameters, and can be included in the new Group.

At the bottom of that page is an area where you will be asked to provide a Name and Description for the new Group. Once again, it is beneficial to be as precise and descriptive as possible.

Provide a Name and Description for the new Group

The screenshot shows the 'Group Resulting from Parameters' section of the ProSMART software. It displays a table of contacts with columns for Company, First Name, Last Name, Type, and Date Modified. Below the table is a 'Group Detail' form with fields for Name and Description, and buttons for Form, reset, and Save.

Company	First Name	Last Name	Type	Date Modified
A LO PRESTI & SONS	CARL	LO PRESTI	Customer	
ALADDIN'S BAKING CO	MAURICE	ABOOD	Customer	
ARAMARK-GUND ARENA	KEVIN	KEARNEY	Customer	
AREA NETWORKS	MARC	CASTELLUCCIO	Customer	
ARMONT INDUSTRIES INC	ARTHUR	BLANC	Customer	
BACIK KARPINSKI ASSOC INC	DALE	BACIK	Customer	
BERTHOLD GRIGSBY INC	TIM	PROK	Customer	
Biodesign International	Christine	Johnson	Customer	1/21/2002
BLONDER CO	FRANK	STERLING	Customer	
BOYKIN LODGING CO	ROBERT	BOYKIN	Customer	
BRITTANY CORP	CHARLES	BOLTON	Customer	
C E FOODS INC	CODINO	SAMRELLIS	Customer	
CAHNERS BUSINESS INFORMATION	DENNY	MC WILLIAMS	Customer	
CAITO BROTHERS CO	LEO	CAITO	Customer	
CARNEGIE CAPITAL ASSET MGMT CO	GEORGE	MATEYO	Customer	
CAVS GUND ARENA	JIM	BOLAND	Customer	
Cell And Molecular Technologies In	Sharon	Claybourn	Customer	
Environmental Specialties Inc.	Donna	Ross	Customer	
Labystems	Victoria	MacOmber	Customer	
Marketreach Inc.	Rod	Griffin	Customer	

Group Detail

Name:

Description:

Once you have provided this information, you will see a summary of the group you have just created for your review.

\ Create Group \ Create Group (Filtered Results) \ Group Detail

Related Links

[Search Groups](#) [Create Group](#)

Group Detail

[Edit](#) [Delete](#) [View Group Members](#)

Group Parameter	Value
Name:	All Customers
Description:	All customers in the database, all product lines
Type:	Customer

If you would like to make changes to the Group parameters, simply click on the “Edit” link.

To delete the Group altogether, click on the “Delete” link.

To see a list of all Contacts included in this Group, click on the “View Group Members” link. Choosing this option will allow you to Update the Membership, Add Members to the Group, or Delete Members from the Group. See the “Update Group Membership” section of this document for more details.



\ Create Group \ Create Group (Filtered Results) \ Group Detail \ View Members

Related Links

[Add Group](#) [Search Groups](#)

View Group Members

[Update membership](#) [Add Member\(s\) to Group](#) [Delete Member\(s\) from Group](#)

Contact Name	Company Name	Title	City, State/Province	Lead Source
ABOOD, MAURICE	ALADDIN'S BAKING CO	CEO	CLEVELAND OH, 44115	User Prostar Import
BACIK, DALE	BACIK KARPINSKI ASSOC INC	CEO	CLEVELAND OH, 44115	User Prostar Import
BLANC, ARTHUR	ARMONT INDUSTRIES INC	CEO	CLEVELAND OH, 44115	User Prostar Import
BOLAND, JIM	CAVS GUND ARENA	CEO	CLEVELAND OH, 44115	User Prostar Import
BOLTON, CHARLES	BRITTANY CORP	CEO	CLEVELAND OH, 44115	User Prostar Import
BOYKIN, ROBERT	BOYKIN LODGING CO	CEO	CLEVELAND OH, 44115	User Prostar Import
CAITO, LEO	CAITO BROTHERS CO	CEO	CLEVELAND OH, 44115	User Prostar Import
CASTELLUCCIO, MARC	AREA NETWORKS	CEO	CLEVELAND OH, 44115	User Prostar Import
Claybourn, Sharon	Cell And Molecular Technologies In		Phillipsburg NJ, 08865	User Prostar Import
Griffin, Rod	Marketreach Inc.		Bedford NH, 03110	User Prostar Import
Hare, Bob	Tennis And Squash Shop		Cambridge MA, 02138	User Prostar Import
Homann, Lynn	Vwr Scientific Products		West Chester PA, 19380	User Prostar Import
Johnson, Christine	Biodesign International	VP, Marketing	Kennebunk ME, 04043	User Prostar Import
KEARNEY, KEVIN	ARAMARK-GUND ARENA	CEO	CLEVELAND OH, 44115	User Prostar Import
LO PRESTI, CARL	A LO PRESTI & SONS	CEO	CLEVELAND OH, 44101	User Prostar Import
Macomber, Victoria	Labsystems		Franklin MA, 02038	User Prostar Import
MATEYO, GEORGE	CARNEGIE CAPITAL ASSET MGMT CO	CEO	CLEVELAND OH, 44115	User Prostar Import
MC WILLIAMS, DENNY	CAHNERS BUSINESS INFORMATION	CEO	CLEVELAND OH, 44115	User Prostar Import
Obrey, John	Obrey Insurance Agency		Derry NH, 03038	User Prostar Import
PROK, TIM	BERTHOLD GRIGSBY INC	CEO	CLEVELAND OH, 44115	User Prostar Import

View/Search for a Group:

1. Click on Group Management from the left navigation menu.
2. Click on "View/Search." This will take you to a standard Search screen.

The screenshot shows a web application interface for searching groups. It features two main search sections: "Simple Group Search" and "Advanced Group Search". Both sections have a "Form" button, a "reset" button, and a "Submit" button. The "Simple Group Search" section includes fields for "Group Name", "Product Line" (with a dropdown menu showing "Commercial Printing", "Promotional Products", and "Business Documents"), and "Type". The "Advanced Group Search" section includes fields for "Group Name", "Type", "SIC", "Product Line" (with the same dropdown menu), "Comp. Revenue", "# of Employees", and "Potential Value".

3. Enter your search parameters in either the "Simple" or "Advanced" search boxes. You can also choose to leave all fields blank. Doing so will return all Groups in the database.
4. Click on either "Submit" button to conduct your search.

The screenshot shows the "Search Results" page. It has a navigation bar with "Groups \ Search Results" and "Related Links" with an "Add Group" button. Below is a "Group Search Results" section with a table. The table has three columns: "Group Name", "Description", and "Date Modified". The table shows one result: "Current Customers" with the description "All Customers Group" and the date "1/21/2002". The page is labeled "Page 1 of 1".

Group Name	Description	Date Modified
Current Customers	All Customers Group	1/21/2002

Any Groups that matched your search parameters will be listed. At this point, you will notice that no details are listed. You will only see the Group Name, the Description and the Date Modified. However, anytime you need to, you can look at the details of the Group.

To View the Details of a Particular Group:

1. Locate the Group for which you would like to see details.
2. Click on the Group Name, which is highlighted in blue.

The screenshot shows the "Group Detail" page. It has a navigation bar with "Groups \ Search Results \ Group Detail" and "Related Links" with a "Search Groups" button and a "Create Group" button. Below is a "Group Detail" section with buttons for "Edit", "Delete", and "View Group Members". The section contains a table with two columns: "Group Parameter" and "Value". The table shows the following details for the "Current Customers" group: Name: Current Customers, Description: All Customers Group, and Type: Customer.

Group Parameter	Value
Name:	Current Customers
Description:	All Customers Group
Type:	Customer

To View the List of Contacts Found in that Specific Group:

1. From the “Group Details” page, click on “View Group Members,” located below the “Group Detail” header.

Groups \ Search Results \ Group Detail \ View Members

Related Links

Add Group

Search Groups

View Group Members

Update membership

Add Member(s) to Group

Delete Member(s) from Group

Contact Name	Company Name	Title	City, State/Province	Lead Source
Claybourn, Sharon	Cell And Molecular Technologies In		Phillipsburg NJ, 08865	User Prostar Import
Griffin, Rod	Marketreach Inc.		Bedford NH, 03110	User Prostar Import
Hare, Bob	Tennis And Squash Shop		Cambridge MA, 02138	User Prostar Import
Homann, Lynn	Vwr Scientific Products		West Chester PA, 19380	User Prostar Import
Johnson, Christine	Biodesign International	VP, Marketing	Kennebunk ME, 04043	User Prostar Import
Macomber, Victoria	Labsystems		Franklin MA, 02038	User Prostar Import
Ross, Donna	Environmental Specialties Inc.		Raleigh NC, 27605	User Prostar Import
Singer, Rahn	Rahn Singer		Hackettstown NJ, 0784047	User Prostar Import
Swearingen, Matt	Vwr Scientific Products		West Chester PA, 19380	User Prostar Import

This displays a list of all the contacts currently assigned to that particular group. The list contains some basic information, such as Contact Name, Company Name, Title, City/State or Province/Postal Code, and Lead Source. At the top of the list, there is another set of “Related Links.” These links will be used to manage the membership of this particular group, and they include:

Update Group Membership

This link involves Contacts that meet the criteria established for this group, but are not yet members of the Group. These could be new Contacts that have been added to your database through the monthly prospect drip or ones that you have added yourself. When new Contacts are added to your database, even though they might satisfy the criteria for a particular Group, they will not be automatically added to the Group. That will require some sort of action on your part. This is done so that there are no surprises as you work with the groups and various campaigns. It keeps control of your database in your hands.

Select, from the list, the Contacts you would like to add to a Group.

Groups \ Search Results \ Group Detail \ View Members \ Update Members

Related Links

Add Group

Search Groups

Update Membership

View Group Members

Contact Name	Company Name	Title	City, State/Province	Lead Source
<input type="checkbox"/> ABOOD, MAURICE	ALADDIN'S BAKING CO	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> BACIK, DALE	BACIK KARPINSKI ASSOC INC	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> BLANC, ARTHUR	ARMONT INDUSTRIES INC	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> BOLAND, JIM	CAVS GUND ARENA	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> BOLTON, CHARLES	BRITTANY CORP	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> BOYKIN, ROBERT	BOYKIN LODGING CO	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> CAITO, LEO	CAITO BROTHERS CO	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> CASTELLUCCIO, MARC	AREA NETWORKS	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> KEARNEY, KEVIN	ARAMARK-GUND ARENA	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> LO PRESTI, CARL	A LO PRESTI & SONS	CEO	CLEVELAND OH, 44101	User Prostar Import
<input type="checkbox"/> MATEYO, GEORGE	CARNEGIE CAPITAL ASSET MGMT CO	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> MC WILLIAMS, DENNY	CAHNERS BUSINESS INFORMATION	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> Obrey, John	Obrey Insurance Agency		Derry NH, 03038	User Prostar Import
<input type="checkbox"/> PROK, TIM	BERTHOLD GRIGSBY INC	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> SAMRELLIS, CODINO	C E FOODS INC	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> STERLING, FRANK	BLONDER CO	CEO	CLEVELAND OH, 44115	User Prostar Import

Form

reset

Add Selected Member(s)

To Update the Group Membership:

1. Click on the "Update Membership" link from the list of "Related Links."
2. This list will show any Contacts that are not currently in your group and are available for inclusion. From the list that is returned, place a check mark next to the name of the Contact that you would like to add to the list. If you are not sure and would like to examine the Contact more closely, simply click on their name, which is highlighted in blue.
3. Click on the "Add Selected Members" button to add these Contacts to the Group.

Add Member(s) to Group

The process for adding members to a Group is the same as for updating Group membership. When you click on this link, you will see a list of Contacts who are currently not in your Group, each with a check mark next to their name.

To Add Member(s) to a Group:

1. Click on the "Add Member(s) to Group link from the list of "Related Links."
2. Locate the name(s) of the Contact you would like to include in the Group
3. Place a check mark in the box to the left of the Contact Name (simply click on the box).

The screenshot shows a web application interface for adding members to a group. At the top, there is a breadcrumb trail: "Groups \ Search Results \ Group Detail \ View Members \ Add Members". Below this is a "Related Links" section with two buttons: "Add Group" and "Search Groups". The main section is titled "Add Member(s) to Group" and contains a "View Group Members" link. Below this is a table with the following columns: "Contact Name", "Company Name", "Title", "City, State/Province", and "Lead Source". The table lists 20 contacts, each with a checkbox in the first column. The contacts are: ABOOD, MAURICE; BACIK, DALE; BLANC, ARTHUR; BOLAND, JIM; BOLTON, CHARLES; BOYKIN, ROBERT; CAITO, LEO; CASTELLUCCIO, MARC; KEARNEY, KEVIN; LO PRESTI, CARL; MATEYO, GEORGE; MC WILLIAMS, DENNY; Obrey, John; PROK, TIM; SAMRELLIS, CODINO; Smith, Tracy; and STERLING, FRANK. At the bottom of the table, there are two buttons: "reset" and "Add Selected Member(s)".

Contact Name	Company Name	Title	City, State/Province	Lead Source
<input type="checkbox"/> ABOOD, MAURICE	ALADDIN'S BAKING CO	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> BACIK, DALE	BACIK KARPINSKI ASSOC INC	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> BLANC, ARTHUR	ARMONT INDUSTRIES INC	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> BOLAND, JIM	CAVS GUND ARENA	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> BOLTON, CHARLES	BRITTANY CORP	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> BOYKIN, ROBERT	BOYKIN LODGING CO	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> CAITO, LEO	CAITO BROTHERS CO	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> CASTELLUCCIO, MARC	AREA NETWORKS	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> KEARNEY, KEVIN	ARAMARK-GUND ARENA	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> LO PRESTI, CARL	A LO PRESTI & SONS	CEO	CLEVELAND OH, 44101	User Prostar Import
<input type="checkbox"/> MATEYO, GEORGE	CARNEGIE CAPITAL ASSET MGMT CO	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> MC WILLIAMS, DENNY	CAHNERS BUSINESS INFORMATION	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> Obrey, John	Obrey Insurance Agency		Derry NH, 03038	User Prostar Import
<input type="checkbox"/> PROK, TIM	BERTHOLD GRIGSBY INC	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> SAMRELLIS, CODINO	C E FOODS INC	CEO	CLEVELAND OH, 44115	User Prostar Import
<input type="checkbox"/> Smith, Tracy	Aurora Management	Owner	Hudson OH, 44236	User Entered
<input type="checkbox"/> STERLING, FRANK	BLONDER CO	CEO	CLEVELAND OH, 44115	User Prostar Import

4. Click on the "Add Selected Member(s)" button to make the changes.

Delete Member(s) from Group

There may be an occasion where you will need to delete a member(s) from a particular Group. Perhaps now they no longer meet the Group criteria as it was originally set up.

To Delete Member(s) from a Group:

1. Click on the “Delete Member(s) from Group” link from the “Related Links” below the “View Group Member(s)” header.
2. Locate the Contact you would like to delete from the Group.

Contact Name	Company Name	Title	City, State/Province	Lead Source
<input type="checkbox"/> Claybourn, Sharon	Cell And Molecular Technologies In		Phillipsburg NJ, 08865	User Prostar Import
<input type="checkbox"/> Griffin, Rod	Marketreach Inc.		Bedford NH, 03110	User Prostar Import
<input type="checkbox"/> Hare, Bob	Tennis And Squash Shop		Cambridge MA, 02138	User Prostar Import
<input type="checkbox"/> Homann, Lynn	Vwr Scientific Products		West Chester PA, 19380	User Prostar Import
<input type="checkbox"/> Johnson, Christine	Biodesign International	VP, Marketing	Kennebunk ME, 04043	User Prostar Import
<input type="checkbox"/> Macomber, Victoria	Labsystems		Franklin MA, 02038	User Prostar Import
<input type="checkbox"/> Ross, Donna	Environmental Specialties Inc.		Raleigh NC, 27605	User Prostar Import
<input type="checkbox"/> Singer, Rahn	Rahn Singer		Hackettstown NJ, 0784047	User Prostar Import
<input type="checkbox"/> Swearengen, Matt	Vwr Scientific Products		West Chester PA, 19380	User Prostar Import

3. Place a check mark in the box to the left of the Contact name.
4. Click on the “Delete Selected Member(s)” button to secure your changes.

Task Management

One of the features of ProSMART is that it is a tool to help you manage your daily Task List for your marketing efforts. Through the Task Management category, you can list daily tasks, set reminders, establish follow-ups, and track your activities.



As seen in the “ProSMART Home Page” section, you can view either your Top 5 Tasks or your complete Task List right from the Home Page. As an alternate, you can also view your complete Task List using the left navigation menu.

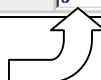
Viewing the Task List

To View your Complete Task List:

1. Click on “Task Management” from the left navigation menu
2. Click on “View.” Your complete task list will be displayed, as seen in the example below. There is also an area to determine for how many days to show the complete list. This number refers to the previous number of days, including today. The default value for this is 5, and can be changed at your discretion. However, any tasks that are classified as “Overdue” will remain on the list as a reminder.
3. If changes are made to the number of days in the “Show Complete for Number of Days” box, click on the “Update” button to secure your changes.

Task List				
Task Summary				
Page 1 of 1				
Date	Contact/Campaign Name	Subject	Status	Type
1/24/2002	Test User	Execution of Campaign: Test User	Overdue	Phone Call
1/27/2002	Johnson, Christine	Send Brochure	Overdue	Direct Mail
1/29/2002	Johnson, Christine	Discuss Two Page Brochures	Overdue	Phone Call
2/6/2002	PROK, TIM	Initial Contact	Overdue	Phone Call
2/6/2002	Smith, Tracy	Send brochure	Overdue	Direct Mail
Show Complete for Number of Days:			5	Update

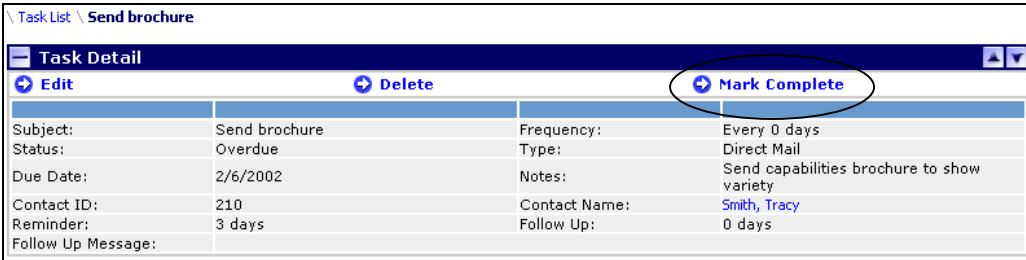
Can modify this value as needed.



This list is automatically sorted by date. Along with the date, the information found on this page includes the Contact/Campaign Name, the Subject, Status, and Type.

To see further information about a specific subject, simply click on the Task Subject, which is highlighted in blue. An example of the Task Detail is shown below.

Modify, Delete or mark the Task as Complete



Task Detail			
Edit Delete Mark Complete			
Subject:	Send brochure	Frequency:	Every 0 days
Status:	Overdue	Type:	Direct Mail
Due Date:	2/6/2002	Notes:	Send capabilities brochure to show variety
Contact ID:	210	Contact Name:	Smith, Tracy
Reminder:	3 days	Follow Up:	0 days
Follow Up Message:			

If this Task has been completed, be sure to click on the “Mark Complete” link, located below the “Task Detail” header.

Campaign Management

A Campaign is a marketing message that is delivered to a pre-determined list of Contacts. The message can be sent in a number of different ways, including direct mail and email, among others.



Within this main “Campaign Management” category are a couple of different options, which by now you should be accustomed to seeing: Create and View/Search. There is also one additional option within this main category, the Media Library. The Media Library is a central storage area for Proforma marketing materials and collateral. The Media Library will be discussed in more detail later in this section.

View/Search for User Campaigns

To View Information about Campaigns:

1. Click on “Campaign Management” from the left navigation menu.
2. Click on View/Search. This will open up a standard search page, with a Simple and an Advanced Search area. Using this search mechanism will return any user-defined Campaigns that have been set up.

The screenshot displays the search interface with the following sections:

- Related Links:** Includes a link to "Add User Campaign".
- Simple User Campaign Search:**
 - Fields: Campaign Name (text input), Type (dropdown menu).
 - Buttons: Form (icon), reset, Submit.
- Advanced User Campaign Search:**
 - Fields: Campaign Name (text input), Type (dropdown menu), Media Type (dropdown menu), Group (dropdown menu).
 - Buttons: Form (icon), reset, Submit.

3. Enter any desired search parameters in the appropriate boxes. Remember that you can also just leave all boxes empty and conduct a blanket search. Doing so will return all records.
4. Click on the “Submit” button.

You will then see a list of all user-defined Campaigns that satisfy the search parameters that you entered on the Search page.

Search User Campaigns \ User Campaign Search Results				
Related Links				
Add User Campaign				
User Campaign Search Results				
Page 1 of 1				
Due Date	Campaign Name	Type	Group	Media Type
1/24/2002	Test User	Phone Call	Current Customers	

This page will show the Due Date of the Campaign, the Name, Type, Group, and Media Type. To see more details of a particular Campaign, click on the name of the Campaign, which is highlighted in blue.

Search User Campaigns \ User Campaign Search Results				
Related Links				
Add User Campaign				
User Campaign Search Results				
Page 1 of 1				
Due Date	Campaign Name	Type	Group	Media Type
2/14/2002	Merge Test	Direct Mail	All	Word Document
2/14/2002	Merge Test	Direct Mail	All	Word Document

You will notice that there is a number of related links found on the Campaign Details page. If needed, you can Edit the Campaign, Delete it, or Export the information to a comma separated value (.csv) file for use in another application.

From here, you can also choose to create a new User Campaign.

To Create a User Campaign:

1. Click on the "Create New User Campaign" link from the list of "Related Links."
2. Provide the necessary information in the form.

Search User Campaigns \ User Campaign Search Results			
Related Links			
Search User Campaigns			
User Campaign Creation Parameters			
NOTE: After submitting a User Campaign, only the Execute Date can be changed.			
Name:	<input type="text"/>	Reminder:	<input type="text" value="Yes"/>
Description:	<input type="text"/>	Reminder Offset:	<input type="text" value="3"/>
Type:	<input type="text"/>	Follow-up:	<input type="text" value="Yes"/>
Execute Date:	<input type="text"/>	Follow-up Offset:	<input type="text" value="3"/>
Group:	<input type="text"/>	Follow-up Message:	<input type="text"/>
Form		reset	Save

In order to set up a new User Campaign, you will need to provide:

- ♦ Campaign Name
- ♦ Campaign Description
- ♦ Type of Campaign
- ♦ Execution Date
- ♦ Group
- ♦ Reminder (Y/N)
- ♦ Reminder Offset
- ♦ Follow-up (Y/N)
- ♦ Follow-up Offset
- ♦ Follow-up Message

The “Type of Campaign” will determine what types of Media you will see. For example, if the Type is “Email,” you will only see the email messages from the Media Library.

3. Click on the “Save” button to secure your changes and set up the Campaign.

Adding Media to a User Campaign

After filling in and submitting the form, you will be asked to choose, from the Media Library, the Media that you would like to use for this Campaign.

The screenshot shows a window titled "Add Media to Campaign" with a table of media items. Each row has a checkbox, a media name, a description, a media class, and a media type. At the bottom, there are buttons for "Form", "reset", and "Save". The "Save" button is circled in red.

Media Name	Description	Media Class	Media Type
<input type="checkbox"/> BrightIdeasCaseLetter	Letter of introduction to accompany a Bright Ideas Case.	Prospecting	Word Document
<input type="checkbox"/> BrightIdeasCaseLetter	Letter describing your services and describing the bright ideas case gift.	Existing Acct. Management	Word Document
<input type="checkbox"/> CanadianBrightIdeasCaseLetter	Letter of introduction to accompany a Bright Ideas Case.	Prospecting	Word Document
<input type="checkbox"/> CanadianBrightIdeasCaseLetter	Letter describing your services and describing the bright ideas case gift.	Existing Acct. Management	Word Document
<input type="checkbox"/> CanadianConfirmReceiptLetter	Confirmation letter to use as a follow-up to a direct mailing.	Prospecting	Word Document
<input type="checkbox"/> CanadianDirProd&ServFollowupLtr	Second followup letter referencing Directory of Products & Services enclosure.	Prospecting	Word Document
<input type="checkbox"/> CanadianLiteratureRequestLetter	Direct mailer followup response letter used when prospect requests more literature.	Prospecting	Word Document
<input type="checkbox"/> CanadianMeetingConfirmationLetter	Meeting confirmation letter to send prior to meeting.	Presentation/Proposal	Word Document
<input type="checkbox"/> CanadianPresentationThkYouLetter	Follow-up thank you letter.	Presentation/Proposal	Word Document
<input type="checkbox"/> CanadianQtrlyUpdateLetter	Letter introducing a sample that you would like to send customer.	Existing Acct. Management	Word Document
<input type="checkbox"/> CanadianROILetter	Letter discussing how Proforma can help a company maximize their return on graphic communications purchases.	Prospecting	Word Document
<input type="checkbox"/> CanadianSeeminglyBelievingLetter	Letter encouraging an appointment for prospect to see, firsthand, the products & services Proforma can provide.	Prospecting	Word Document
<input type="checkbox"/> CanadianWhoWeAreLetter	Letter of introduction discussing your ability to be a solutions provider for a company.	Prospecting	Word Document
<input type="checkbox"/> ConfirmReceiptLetter	Confirmation letter to use as a follow-up to direct mailing	Prospecting	Word Document

1. Locate the Media from the list that you would like to use for the Campaign. If you are not sure what a particular piece contains and would like to see details about that particular item, click on the Name of the Media, which is highlighted in blue.

The screenshot shows a window titled "Media Library Detail" with a "Related Links" section containing "Search Media Library" and "Add Media to Library". Below is a "Media Library Detail" section with "Edit" and "Delete" buttons. A "View Media" button is circled in red. To the right, an arrow points to the "View Media" button with the text "Click 'View Media' to see a sample".

Media Name:	BrightIdeasCaseLetter
Description:	Letter describing your services and describing the bright ideas case gift.
File Name:	Template_BrightIdeasCaseLtr.doc
Subject/Link:	
Media Type:	Word Document
Media Class:	Existing Acct. Management

Clicking on “View Media” will display the piece in a new window for you to review at your convenience.

After you are done reviewing this piece, simply close out the window to return to ProSMART.

*Sample of a letter
chosen from the
Media Library:*

«LetterDates»

«PCFirstName» «PCLastName»
«PCStreet1»
«PCStreet2»
«PCCity», «PCStateProv» «PCZipCode»

Dear «PCFirstName» «PCLastName»:

Are you looking for a solutions provider that offers you a resource for custom imprinted commercial printing, business documents, promotional products and e-solutions? A resource that offers you more control, improved productivity and increased profitability?

In today's business world, focusing time on multiple vendors, searching for the right product and spending hours processing orders takes away from your main focus... profitability for your company.

My name is «AUFirsrName» «AULastName», owner of «AUFranchise», a member of the leading graphic communications provider to the business-to-business market. We offer expertise, product knowledge and real solutions for al your graphic communication needs.

Enclosed, please find a special gift, our Proforma Bright Ideas case, that shows you just a few of the examples of products I can offer your business. In the upcoming weeks I would like the opportunity to meet with you one-on-one. Learn more about your business needs and show you some of the services we can offer.

I will follow-up with you in a couple of weeks and look forward to speaking with you then.

Sincerely,

«AUFirsrName» «AULastName»
Owner
«AUFranchise»

2. Place a check mark in the box to the left of the Media Name that you would like to include in your Campaign.
3. Click on the "Save" button.

A couple of notes about the Word mail merge feature:

When performing a mail merge from a letter in Word format, you will notice a few different things happening when you execute this type of Campaign. First, Word will open up on your desktop and you will see the merged letters (will all be in one document, with each individual letter beginning on a separate page). These are then ready to print and send. You will also be provided with mailing labels. A Task (stuff and mail) will then be added to your Task List as a reminder.

If the Campaign is to be an email format, the fulfillment of the campaign will be done automatically on the due date.

View Central Campaigns (Owner Only)

From the main Campaign search page, you will be able to view and Central Campaigns that have been scheduled by the Support Center. This feature is available to the Owner only.

To View Central Campaigns

1. Click on “View/Search” from within the “Campaign Management” category in the left navigation menu.

The screenshot shows the 'Search User Campaigns' interface. Under the 'Related Links' section, the 'View Central Campaigns' link is highlighted with a red circle. Below this, there is a 'Simple User Campaign Search' section with input fields for 'Campaign Name' and 'Type', and buttons for 'Form', 'reset', and 'Submit'. At the bottom, there is an 'Advanced User Campaign Search' section.

2. Click on “View Central Campaigns” from the list of “Related Links.” You will see a list of all current Central Campaigns, including their name and due date. This due date refers to the date by which you must decide whether or not you will participate in the Campaign, as well as which participants to assign to the Campaign.

The screenshot shows the 'View Central Campaigns' page. It displays a table with two columns: 'Campaign Name' and 'Campaign Due Date'. The first row shows 'ProUSA February Postcard' with a due date of '2/6/2002'.

Campaign Name	Campaign Due Date
ProUSA February Postcard	2/6/2002

3. Click on the Campaign Name, which is highlighted in blue, to view the details of this Campaign.

The screenshot shows the 'Central Campaign Detail' page for the 'ProUSA February Postcard' campaign. It includes a table with various details:

Central Campaign Detail			
Assign Participants to Central Campaign			
Name:	ProUSA February Postcard	Follow-up:	No
Type:	Direct Mail	Follow-up Offset:	0
Media Material:	3X5 postcards	Ad Fund Maximum # of Participants:	50
Due Date:	2/6/2002	Ad Fund Maximum # of Prospects:	30
Fulfillment Date:	2/12/2002	Ad Fund Maximum # of Customers:	20
Status:	Active	Per Unit Cost:	1
Minimum Overage:	100	Block Size:	50
Subsidized Block Cost:	50		

This screen will display the pertinent details surrounding the Campaign, including:

- | | |
|--|--------------------------------|
| ♦ Campaign Name | ♦ Subsidized Block Cost |
| ♦ Type of Campaign | ♦ Follow-Up |
| ♦ Media Material | ♦ Follow-Up Offset |
| ♦ Due Date | ♦ Ad Fund Maximum # of |
| ♦ Fulfillment Date (the date the material will be sent) | Participants |
| ♦ Status of the Campaign | ♦ Per Unit Cost |
| ♦ Minimum Overage | ♦ Block Size |

Most of these details are self-explanatory, although a few of these elements may need clarification, especially when participating in a Central Campaign for the first time.

▶ **Minimum Overage** – The minimum amount by which you can exceed the pre-defined number of participants. In the example above, you must purchase at least 100 additional units.

▶ **Subsidized Block Cost** – The dollar amount that is subsidized by the Ad Fund.

▶ **Follow-Up** – Whether or not a follow-up message will be provided with this Campaign.

▶ **Follow-Up Offset** – The number of days prior to the follow-up date; a reminder will be put on your Task List for the follow-up.

▶ **Per Unit Cost** – The cost of each additional unit that can be purchased. In the example above, the Per Unit Cost is \$1. If the Block Size is set to \$50, it will cost \$100 to add an additional 100 contacts to the campaign, over the subsidized 50.

▶ **Block Size** – The required number of units that must be purchased if exceeding the subsidized amount. For example, if the Block Size were set to 50, you would need to purchase 50, 100, 150, etc. additional units.

Assigning Participants to the Central Campaign (Owner Only)

After reviewing the details of the Campaign and deciding that you would like to participate, you will need to indicate which of your Contacts will be included in the Campaign. This capability is available to the Owner only. Other Users will not have the ability to assign participants to Central Campaigns.

To Assign Participants to the Central Campaign:

1. From the Central Campaign Details page, click on the “Assign Participants to Central Campaign” link from below the “Central Campaign Detail” header. You will see a list of all the Contacts in your database. If there is more than one page of Contacts, that will be indicated at the top of the list. Use the page navigation arrows to move from one page to the next.

Search User Campaigns \ View Central Campaigns \ Add Contacts to Central Campaign

Submit Contacts for Central Campaign Page 1 of 2

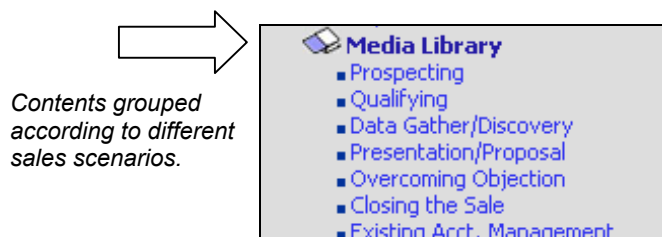
Contact Name	Company	Title
<input type="checkbox"/> Johnson, Christine	Biodesign International	VP, Marketing
<input checked="" type="checkbox"/> Claybourn, Sharon	Cell And Molecular Technologies In	
<input type="checkbox"/> Ross, Donna	Environmental Specialties Inc.	
<input type="checkbox"/> Macomber, Victoria	Labsystems	
<input checked="" type="checkbox"/> Griffin, Rod	Marketreach Inc.	
<input checked="" type="checkbox"/> Obrey, John	Obrey Insurance Agency	
<input type="checkbox"/> Singer, Rahn	Rahn Singer	
<input checked="" type="checkbox"/> Hare, Bob	Tennis And Squash Shop	
<input type="checkbox"/> Homann, Lynn	Vwr Scientific Products	
<input type="checkbox"/> Swearengen, Matt	Vwr Scientific Products	
<input type="checkbox"/> LO PRESTI, CARL	A LO PRESTI & SONS	CEO
<input type="checkbox"/> ABOOD, MAURICE	ALADDIN'S BAKING CO	CEO
<input type="checkbox"/> KEARNEY, KEVIN	ARAMARK-GUND ARENA	CEO
<input checked="" type="checkbox"/> CASTELLUCCIO, MARC	AREA NETWORKS	CEO
<input type="checkbox"/> BLANC, ARTHUR	ARMONT INDUSTRIES INC	CEO
<input type="checkbox"/> BACIK, DALE	BACIK KARPINSKI ASSOC INC	CEO
<input type="checkbox"/> PROK, TIM	BERTHOLD GRIGSBY INC	CEO
<input type="checkbox"/> STERLING, FRANK	BLONDER CO	CEO
<input type="checkbox"/> BOYKIN, ROBERT	BOYKIN LODGING CO	CEO
<input type="checkbox"/> BOLTON, CHARLES	BRITTANY CORP	CEO

Form reset Save

2. Locate the participants you would like to include in the Campaign.
3. Place a check mark in the box to the left of their name.
4. Click on the “Save” button to secure your selections. **Important: If you are making selections from more than one page, you must save your selections after each page (prior to moving to the next page), otherwise your choices will not be saved.**

The Media Library

ProSMART maintains a complete Media Library of materials that can be used for various marketing Campaigns. This library is maintained by the Marketing Department and is updated whenever new materials become available. The Media Library many times will list the same marketing piece, but in a different format. This is done for your convenience so that you can find just the right piece to suit your Campaign needs. In the Media Library you will find Word documents, Power Points, Email messages, and even informative Links.



To Search the Media Library - Categories

1. Click on the "Campaign Management" category from the left navigation menu.
2. Click on "Media Library."

You will notice that this subcategory expands to include a number of different sales situations. If you are looking for a piece for a particular sales situation, simply click on that sales situation from the list. You will then see a list of all materials that suit that particular situation.

3. Enter your search criteria in the appropriate "Search" box(es). Where available, use the drop-down menus to make your selection.

Simple Media Library Search

Media Parameter	Value
Media Name:	<input type="text"/>
Type:	<input type="text"/>
Class:	<input type="text"/>

Advanced Media Library Search

Media Parameter	Value
Media Name:	<input type="text"/>
Type:	<input type="text"/>
Class:	<input type="text"/>
Description:	<input type="text"/>
Subject:	<input type="text"/>
File Name:	<input type="text"/>

Type:

- Word Document
- Email
- Phone Call
- Direct Mail
- Presentation
- Brochure
- Link

Class:

- Prospecting
- Qualifying
- Data Gathering/Discovery
- Presentation/Proposal
- Overcoming Objections
- Closing the Sale
- Account Management

4. Click on the "Submit" button at the bottom of the page to conduct your search.

Leaving all fields blank will bring back all Media and all types of Media contained in the Media Library. Using the search parameters to limit your search will bring back only those pieces that satisfy your established search criteria.

Media Library Search Results		
Page 1 of 1		
Media Name	Type	Description
BrightIdeasCaseLetter	Word Document	Letter of introduction to accompany a Bright Ideas Case.
BrilliantIdeas/SmartThinkingSheets	Link	Link to Marketing Company Store to purchase Brilliant Ideas and Smart Thinking Case Studies and Industry Tips. Accompany a prospecting letter with one of the cases.
CanadianBrightIdeasCaseLetter	Word Document	Letter of introduction to accompany a Bright Ideas Case.
CanadianConfirmReceiptLetter	Word Document	Confirmation letter to use as a follow-up to a direct mailing.
CanadianDirProd&ServFollowupLtr	Word Document	Second followup letter referencing Directory of Products & Services enclosure.
CanadianLiteratureRequestLetter	Word Document	Direct mailer followup response letter used when prospect requests more literature.
CanadianROILetter	Word Document	Letter discussing how Proforma can help a company maximize their return on graphic communications purchases.
CanadianSeeingIsBelievingLetter	Word Document	Letter encouraging an appointment for prospect to see, firsthand, the products & services Proforma can provide.
CanadianWhoWeAreLetter	Word Document	Letter of introduction discussing your ability to be a solutions provider for a company.
CompanionBrochures	Link	Link to Marketing Company Store to purchase from 5 printed versions of the companion brochure. These include: General Capabilities, Commercial Print, Business Documents, Promotional Products and E-Solutions.
ConfirmReceiptLetter	Word Document	Confirmation letter to use as a follow-up to direct mailing

To View the Details of a Particular Media Piece

1. From the list of Media materials, locate the one you would like to learn more about.
2. Click on the name of the piece, which is highlighted in blue. This will show some basic details of the piece.

Search Results	
Related Links	
Search Media Library	Add Media to Library
Media Library Detail	
Edit	Delete
View Media	
Media Name:	BrightIdeasCaseLetter
Description:	Letter of introduction to accompany a Bright Ideas Case.
File Name:	Template_BrightIdeasCaseLtr.doc
Subject/Link:	
Media Type:	Word Document
Media Class:	Prospecting

Remember, you can view the actual piece by clicking on the “View Media” link, located below the “Media Library Detail” header.

There may be a case where you know the name of a piece you would like to add to a Campaign. If you would like to look for a particular Media piece, you can use the search feature. This process is explained in more detail in the following section.

To Search the Media Library - General

1. Click on “Media Library” from the left navigation menu. This is found within the “Campaign Management” section.



2. Determine which type of search you would like to conduct, whether a “Simple Search” or an “Advanced Search.” Enter your parameters into the appropriate fields. You may also choose to conduct a blanket search and leave all fields blank, in which case all Media will be returned.

For “Type,” you may choose from the following:

- ✦ Word Document
- ✦ Email
- ✦ Phone Call
- ✦ Direct Mail
- ✦ Presentation
- ✦ Brochure
- ✦ Link

For “Class,” you may choose from the following (Correspond to the Sales Cycle):

- ✦ Prospecting
- ✦ Qualifying
- ✦ Data Gathering/Discovery
- ✦ Presentation/Proposal
- ✦ Overcoming Objections
- ✦ Closing the Sale
- ✦ Account Management

3. Click on the corresponding “Submit” button.

Any Media materials that match your search parameters will be returned. The information in the list will include the Media Name, Type of Media and a brief Description. To see more details or to view the actual Media piece, click on the Media Name, which is highlighted in blue.

Click on the name to see details.

Search Media Library \ Search Results		
Related Links		
Add Media to Library		
Media Library Search Results		
Page 1 of 2		
Media Name	Type	Description
BrightIdeasCaseLetter	Word Document	Letter of introduction to accompany a Bright Ideas Case.
BrightIdeasCaseLetter	Word Document	Letter describing your services and describing the bright ideas case gift.
BrilliantIdeas/SmartThinkingSheets	Link	Link to Marketing Company Store to purchase Brilliant Ideas and Smart Thinking Case Studies and Industry Tips. Accompany a prospecting letter with one of the cases.
BusinessDocumentsPowerPointPresentation	Presentation	PowerPoint presentation covering business document products and service capabilities.
CanadianBrightIdeasCaseLetter	Word Document	Letter of introduction to accompany a Bright Ideas Case.
CanadianBrightIdeasCaseLetter	Word Document	Letter describing your services and describing the bright ideas case gift.
CanadianConfirmReceiptLetter	Word Document	Confirmation letter to use as a follow-up to a direct mailing.
CanadianDirProd&ServFollowupLtr	Word Document	Second followup letter referencing Directory of Products & Services enclosure.
CanadianLiteratureRequestLetter	Word Document	Direct mailer followup response letter used when prospect requests more literature.
CanadianMeetingConfirmationLetter	Word Document	Meeting confirmation letter to send prior to meeting.
CanadianPresentationThkYouLetter	Word Document	Follow-up thank you letter.
CanadianQtrlyUpdateLetter	Word Document	Letter introducing a sample that you would like to send customer.
CanadianROILetter	Word Document	Letter discussing how Proforma can help a company maximize their return on graphic communications purchases.

Response Management

ProSMART users will have the opportunity to engage in some basic Response Management as a result of their marketing efforts. This will allow him or her to filter bad addresses out of their database so that they do not continue to be used for various Campaigns. Whenever a user receives mail returned from the Postal Service or an email returned undeliverable, they will have to opportunity to indicate that the address is bad and try and locate the correct address.

This section will list all addresses with the corresponding “Bad Address” flag set to “Yes” in contact records. This is primarily used as a queue for you to work through in an attempt to locate the correct addresses for these specific contacts.



Direct Mail

To View Bad Postal Addresses

1. Click on “Direct Mail” from the “Response Management” category in the left navigation menu.

Response Management				
Bad Address Search Results				
Page 1 of 0				
Type	Name	Phone	City	State
Contact	Smithy, Tracy	330 6501234 x	Hudson	OH

A list of all contacts with the “Bad Postal Address” flag set to “Yes” is displayed. An example of this designation is shown below.

Contact Advanced Detail	
Contact Type:	New Prospect
Preferred Contact Method:	Phone
Nick Name:	
Responsibility:	
Manager:	
Spouse:	
Birthday:	
Address1:	26 GOERGETOWN RD
Address3:	
City:	Hudson
Postal Code:	44236
WebSite:	
Prospect Contact Status:	Bad Email Address: Yes Bad Postal Address: Yes Bad Phone: No Bad Fax: No

2. From the “Bad Address Search Results” page, click on the “Contact Name,” highlighted in blue, to see the detailed contact record.

Email

To View Bad Email Addresses

1. Click on "Email" from the "Response Management" category in the left navigation menu.

Response Management				
Bad Email Address Search Results				
Page 1 of 0				
Type	Name	Phone	City	State
Contact	Smith, Tracy	330 6501234 x	Hudson	OH

A list of all contacts with the "Bad Email Address" flag set to "Yes" will be displayed. An example of this is shown below.

Contact Advanced Detail	
Contact Type:	New Prospect
Preferred Contact Method:	Phone
Nick Name:	
Responsibility:	
Manager:	
Spouse:	
Birthday:	
Address1:	26 GOERGETOWN RD
Address3:	
City:	Hudson
Postal Code:	44236
WebSite:	
Prospect Contact Status:	<div> <div>Bad Email Address: Yes</div> <div>Bad Postal Address: Yes</div> <div>Bad Phone: No</div> <div>Bad Fax: No</div> </div>

2. Click on the "Contact Name," highlighted in blue, to see the detailed Contact record.

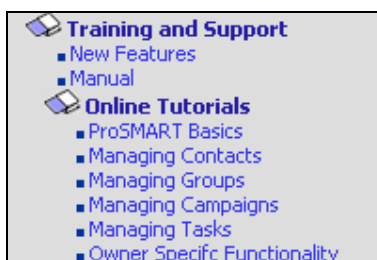
Report Management

Coming Soon

The Reporting section for ProSMART is still in the process of being finalized. As soon as the Reports are defined and constructed, they will be made available to ProSMART users.



Training and Support



This section of ProSMART addresses two very important aspects of using this system: New Features and Online Training.

New Features

Whenever New Features are added to ProSMART, they will be featured in this section. Having the New Features outlined in the manner will allow users to know, without having to search and guess, what has been added to the system.

Manual

This option will allow you to access the ProSMART User's Manual directly from within the application. The manual is in PDF format.

Online Tutorials

This section will house various "Viewlets" that will explain different components of ProSMART. Different categories are listed so that a user can choose exactly what they would like to learn more about. These categories reflect the main functionalities that you will use in ProSMART.

A "Viewlet" is a self-running, animated demonstration of how something works. You will not need to install anything special on your machine to run these "Viewlets," simply click on the links, sit back and watch!

You can view these vignettes as often as needed. As new components are added to ProSMART, new "Viewlets" will be added to this Online Training section.



User Account Management

The “User Account Management” section is where you can manage several aspects of your ProSMART account. This feature provides added convenience to you since you will not have to contact the Cleveland Support Center to make these modifications. To some extent, your security permission will dictate what settings you will be able to view and modify. This section includes things such as Passwords, Settings, Contact Assignments, and Users.



Managing your ProSMART Account

1. Click on “User Account Management” from the left navigation menu.
2. Locate the category of Account Management you would like to view.
3. Click on that category to make any necessary changes.

In this section, you can control the following:

Profile/Preferences

Choosing “Profile/Preferences” from the list of “Account Management” options will take you to an area where you can control some of the basic settings of ProSMART. Depending on your security access, you may or may not be able to make changes to every setting.

A screenshot of a web application interface showing two forms. The top form is titled 'User Settings' and has a blue header bar. It contains three rows of settings: 'Reminder Offset:' with a value of '3', 'Follow Up Offset:' with a value of '5', and 'Show Task Complete Days:' with a value of '5'. Each row has a text input field. At the bottom of the form are two buttons: 'reset' and 'Save Setting Changes'. The bottom form is titled 'Edit Password' and also has a blue header bar. It contains three rows of password fields: 'Old Password:', 'New Password:', and 'Confirm New Password:'. Each row has a text input field. At the bottom of the form are two buttons: 'reset' and 'Save Password Changes'.

User Settings

Any user of ProSMART will be able to adjust some of the default settings of ProSMART. This section is not limited to Owners, but is available to anyone who has access to ProSMART.

The following default values can be changed:

- ♦ **Reminder Offset** – The number of days prior to a deadline or event that a Reminder will be added to your Task List. The default number of days is 3.
- ♦ **Follow-Up Offset** – The number of days after the deadline or event is complete; a Follow-Up action that a note will be added to your Task List. The default number of days is 3.
- ♦ **Show Task Complete Days** – The tasks for a number of days, prior to today, that will be listed on your complete Task List. The default number of days is 5.

Modify your
default settings

To Make Changes to Default Values:

1. Enter the desired number of days into the box to the right of the category.
2. Click on the “Save Changes” button to lock in the new values.

Edit Password

Anyone using ProSMART will be able to edit his or her password.

To Edit your Password:

1. Enter your Old Password in the space provided.
2. Enter your New Password in the space provided.
3. Type your New Password once again to confirm your selection.
4. Click on the “Save Changes” button to secure the new password.

Prospect Assignment (Owner Only)

In this “User Account Management” section, the Proforma Owner will be able to manage the assignment of the prospects they receive each month through the “drip,” *as well as* any other Contacts in the ProSMART database. This will be beneficial when new prospect records are added to the database or when a sales rep leaves your organization or changes territories. This will ensure that a contact will not be overlooked.



Manage your Prospect Drip

1. Click on the “Manage Prospect Drip” option from the “User Account Management” category in the left navigation menu.

You will see a page that is divided vertically. On the left is a list of all the Sales Reps in your company, including yourself. Below each rep’s name is a list of all the contacts currently assigned to him or her. To the left of each rep is a place to reassign the contact to another sales rep.

Any new prospects that are in your system from the monthly prospect drip but are currently unassigned will be at the very top of the page in an area labeled “Unassigned.” Contacts that are imported manually into ProSMART by you will be found in the area under your name (or under the name of the person whom you are logged into the system as).

The screenshot shows the "Prospect Assignment" window. It has a top navigation bar with "Related Links" and "Profile/Preferences". Below is the "Edit Prospect Drip" section. The interface is divided into two main columns. The left column lists sales reps: "Unassigned", "Platko, Joe", "Hileman, Tom", "Binzley, Robert", "Miller, Chris", and "Binzley, Robert". The right column shows the contacts assigned to each rep, with a "Move To" button and a dropdown menu for each contact. The "Unassigned" section shows a list of contacts: Johnson, Christine - Biodesign International, Claybourn, Sharon - Cell And Molecular Technologies In, Ross, Donna - Environmental Specialties Inc., and MacOmber, Victoria - Labsystems. The "Binzley, Robert" section shows "Hileman, Tom - Test Company". At the bottom, there are "Form", "reset", and "Save Changes" buttons.

To Assign or Reassign a Contact:

1. Locate the sales rep from the list with which you would like to work.

Select the Rep
from the list

2. In the box below the rep's name, locate the contact that you would like to move.

3. Click on the name of that contact.

4. In the right half of the page, use the drop-down menu to locate the name of the rep you would like to assign this contact to.
5. Click on that name to make your selection.
6. Click on the "Move To" button to make the change.
7. Click on the "Save Changes" button at the bottom of the page to make the changes in contact assignment.

User Listing

An Owner will be able to view a list of everyone that has access to his or her ProSMART system. An Owner will also have the ability to set up new users to access their ProSMART system, and assign them with security permissions.



View User Listing

To view the list of individuals with access to your ProSMART system,

1. Click on "User Listing" from the "User Account Management" category in the left navigation menu. You will see a list of everyone who has access to your database. This list will show their Name, Email Address and Franchise.
2. Click on the individual's name to view more details.

The screenshot shows two parts of the ProSMART system interface. The top part is the 'User List' page, which has a table with columns 'Name', 'Email', and 'Franchise'. The bottom part is the 'User Detail' page for a selected user, showing fields like 'User Name', 'Last Name', 'Franchise', 'Roles', 'First Name', and 'Follow Up Offset'.

User List

Related Links
Add User

User List Page 1 of 1

Name	Email	Franchise
Binzley, Robert	rbinzley@proforma.com	ProForma Dev Crew
Binzley, Robert	rbinzley@proforma.com	ProForma
Hileman, Tom	thileman@proforma.com	ProForma Corporate
Miller, Chris	cmiller@proforma.com	ProForma Dev Crew
Platko, Joe	jplatko@proforma.com	Keybase - []

User List \ Binzley, Robert

Related Links
Add User

User Detail

Edit Delete

User Name:	rbinzley@proforma.com	Roles:	Developer
Last Name:	Binzley	First Name:	Robert
Franchise:	ProForma Dev Crew	First Name:	13
Reminder Offset:	6	Follow Up Offset:	4

For each User, you will be able to edit their information, or delete the User altogether. The "Delete" option will be invaluable if an employee leaves your organization and you want to ensure that he or she will not be able to access ProSMART anymore.

Adding a User

Owners will be able to give other people access to their ProSMART system; they will not need to contact the Support Center to get this done.

To Add a User to ProSMART:

1. Click on “Add User,” located in the “Related Links” section.
2. Complete the form with the appropriate information.

add User	
User Name:	<input type="text"/>
Role:	ProSmart - Marketing
Password:	<input type="password"/>
Confirm Password:	<input type="password"/>
Last Name:	<input type="text"/>
First Name:	<input type="text"/>
Franchise:	<input type="text"/>
Drip:	0
Follow Up Offset:	5
Reminder Offset:	3
Entity:	PFG Ventures - []
<input type="button" value="Form"/> <input type="button" value="reset"/> <input type="button" value="Add User"/>	

You will need to provide the following pieces of information (left to right):

- | | |
|--|---------------------------|
| ♦ User Name | ♦ Franchise |
| ♦ Role (Owner or Sales) | ♦ Drip |
| ♦ Password (you determine) | ♦ Follow-Up Offset |
| ♦ Confirm Password (enter it again) | ♦ Reminder Offset |
| ♦ Last Name | ♦ Entity |
| ♦ First Name | |

3. Click on the “Add User” button to complete the addition process.

ProSMART Terms & Definitions

➤ General Terms

Campaign – A marketing message that is delivered to a pre-determined list of Contacts. The message can be sent in any one of a number of different ways, including direct mail and e-mail, among others.

Central Campaign – A Campaign that is established by the Marketing Department at the Support Center. The Ad Fund subsidizes a certain number of participants, and the Campaign is fulfilled centrally. The Owner does not need to fulfill this Campaign.

Contact – An individual within a Company.

Customer – A company that has purchased from you in the last 24 months.

De-duplication – The process of recognizing duplicate entries in the database that actually represent the same data point.

Direct Mail – Outbound postal mail to a group of contacts or customers. Direct mail can contain letters, postcards, flyers, etc.

E-Mail – Outbound electronic mail to a group of contacts or customers. The outbound mail can be in plain text or HTML format.

Group – A logical collection of contacts, whether current customers or prospects, that will be acted upon for marketing activities.

Media Library – Storage for marketing materials and collateral available in a central location for use by Owners.

Response – An action that is taken because of another event. Response is used in this system to denote actions taken based on the return of information to a User. That is, incorrectly addressed mail is returned or an e-mail message is returned.

Tasks – Actions that must be taken.

To Do List – Lists of tasks that must be completed.

User Account – An individual account for a User. All User accounts fall under an Owner ID and are administered by the Owner.

User Campaign – A campaign defined and conducted by the individual Owner. The Ad Fund does not subsidize this campaign, and it is up to the Owner to fulfill the campaign.

➤ Contact Type Descriptions

New Prospect – A person at a contact company that is not buying from you currently, and is not well known to you.

Prospect – A person at a contact company that is not buying from you currently but is relatively well known to you.

Qualified Prospect – A person at a contact company that is not buying from you currently, is relatively well known to you, and has demonstrated adequate interest, purchase time frame, and budget to you.

Presentation/Proposal – A person at a contact company has been given a presentation or proposal on a specific product(s).

Customer – A person who has purchased from you in the last 24 months.

Inactive Customer – A contact that has indicated either a lack of interest or stated no interest in the products or services of Proforma.

➤ Company Type Descriptions

Customer – A person who has purchased from you in the last 24 months.

Inactive customer – A person who has not purchased from Proforma in the last 24 months, but was a previous customer of Proforma.

Prospect – A person who has never purchased from you or from Proforma.